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Brazil Finance and Supply Chain

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Table of Contents

Finance and Supply Chain **4**

Finance and Supply Chain workflows 5

Supply chain transformation 6

Finance and Supply Chain applications 7

Common applications 8

Finance Case Management 17

ServiceNow Otto applications for Finance and Supply Chain 53

ServiceNow Otto for Finance and Procurement 54

Source-to-Pay Operations 76

Purchasing and sourcing workflows 78

ServiceNow Otto 86

Workspace 88

Integrations 116

Purchase Order Management 309

Sourcing and Procurement Operations 374

ServiceNow Otto for SPO 376

Explore 441

Configure 642

Integrate 737

Use 809

Reference 996

Supplier Lifecycle Operations 1043

ServiceNow Otto for SLO 1044

Explore 1075

Configure 1088

Integrate 1165

Use 1188

Reference 1341

Accounts Payable Operations 1367

ServiceNow Otto for APO 1368

Explore 1419

Configure 1422

Use 1458

AI worker case resolution confirmation 1568

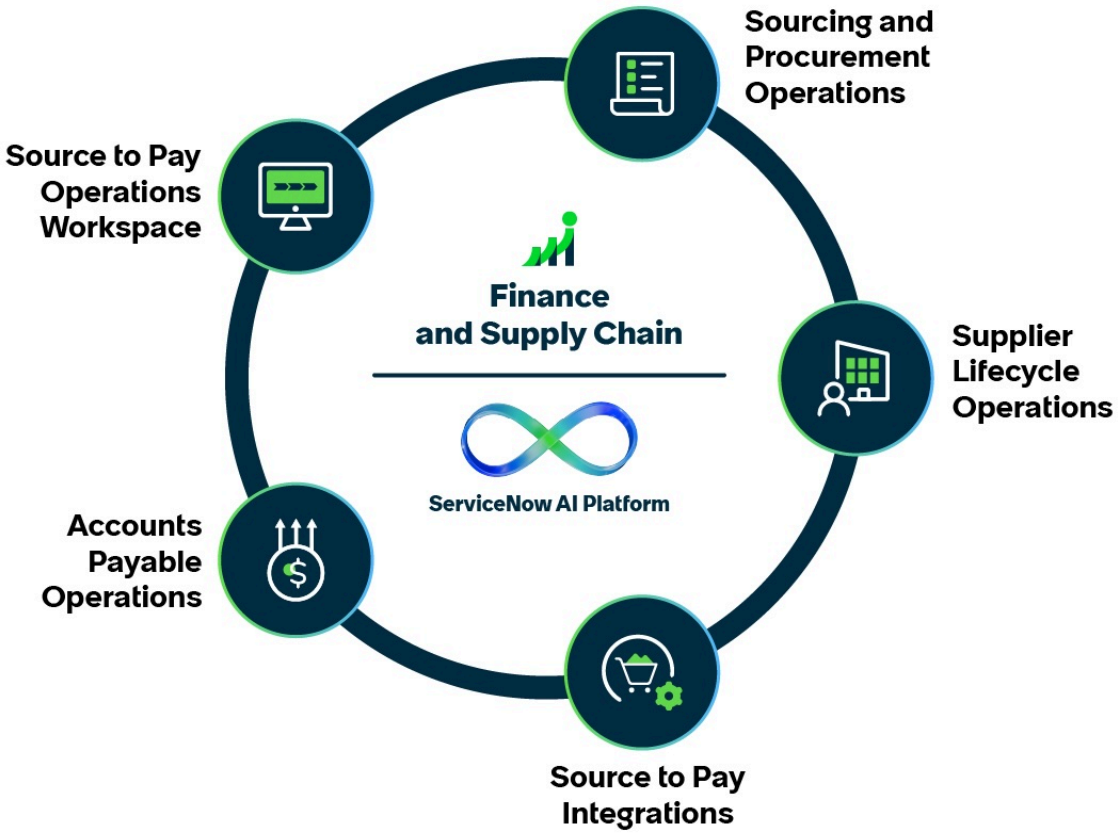
Integrate 1572

Reference 1587

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Finance and Supply Chain

ServiceNow® Finance and Supply Chain workflows unify processes, data, and technology on a single platform. The workflows automate manual tasks, simplify approvals, and improve visibility across key processes, especially source to pay operations, helping finance, procurement, and supply chain teams operate more efficiently.



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?

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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

- Finance and Supply Chain workflows
- Finance and Supply Chain applications
- ServiceNow Otto applications for Finance and Supply Chain
- Source-to-Pay Operations
- Sourcing and Procurement Operations
- Supplier Lifecycle Operations
- Accounts Payable Operations

Finance and Supply Chain workflows

ServiceNow Finance and Supply Chain workflows coordinate finance, procurement, and supply chain activities on a workflow-driven platform, reducing manual effort and improving visibility across teams, systems, and suppliers.

Finance and Supply Chain workflows include product suites, products, and applications that support different finance and supply chain use cases. These workflows connect teams, systems, and suppliers across core business processes.

What Finance and Supply Chain workflows include

Finance and Supply Chain workflows consist of components that support procurement, finance, and supplier operations. Each component addresses specific business needs within the broader finance and supply chain landscape.

Component	Where it belongs	Description
Source-to-Pay Operations	Product suite (within Finance and Supply Chain workflows)	Supports end-to-end procurement and payment processes by bringing together supplier, sourcing, purchasing, and payment workflows.
Supplier Lifecycle Operations	Product (within Source-to-Pay Operations product suite)	Manages supplier onboarding, offboarding, and ongoing supplier data management, including collaboration and governance.
Sourcing and Procurement Operations	Product (within Source-to-Pay	Supports sourcing and procurement workflows, purchasing activities, and spend visibility.

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Component	Where it belongs	Description
	Operations product suite)	
Accounts Payable Operations	Product (within Source-to-Pay Operations product suite)	Automates invoice processing, exception handling, approvals, and payment-related workflows.
Purchase Order Management	Application (within Source-to-Pay Operations product suite)	Helps teams manage purchase order exceptions and related tasks as part of procurement workflows.
Finance Case Management	Application (within Finance and Supply Chain workflows)	Supports finance service requests and inquiries, enabling finance teams to track, manage, and resolve finance-related requests.

Common capabilities across Finance and Supply Chain workflows

Finance and Supply Chain workflows share common capabilities that support integration, collaboration, and process orchestration.

- ERP integration to exchange data with existing financial and procurement systems
- Supplier-facing experiences, including portals for collaboration and requests
- Task orchestration across procurement, finance, and supplier teams
- Workflow-driven exception handling and approvals

How Finance and Supply Chain workflows are used

Organizations adopt Finance and Supply Chain workflows based on business goals. Some organizations focus on procurement and payments through Source-to-Pay Operations, while others also use Finance Case Management to support finance service requests.

Finance and Supply Chain workflows support outcomes such as improved operational efficiency, better cross-team coordination, and greater visibility across finance and supply chain processes.

Supply chain transformation with Finance and Supply Chain workflows

ServiceNow Finance and Supply Chain workflows support supply chain transformation by standardizing, automating, and connecting sourcing, procurement, payment, and supplier collaboration processes across organizations.

Organizations are transforming supply chain operations to improve resilience, visibility, and efficiency across sourcing, procurement, payments, and supplier collaboration.

Finance and Supply Chain workflows support supply chain transformation through integrated products across multiple supply chain stages.

These workflows standardize, automate, and connect supply chain processes, improving coordination among suppliers, procurement teams, and finance operations.

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How Finance and Supply Chain workflows support supply chain transformation

Finance and Supply Chain workflows address fragmented processes, limited visibility, manual handoffs, and disconnected systems through products in the Finance and Supply Chain Workflows.

Together, these products help organizations:

- Automate sourcing, procurement, and payment processes
- Improve supplier onboarding, collaboration, and lifecycle management
- Increase visibility across procurement and financial operations
- Reduce operational risk and support compliance

Products that enable supply chain transformation

Products within Finance and Supply Chain workflows support different supply chain stages.

Note: Source-to-Pay Operations is a product suite that includes Sourcing and Procurement Operations, Supplier Lifecycle Operations, and Accounts Payable Operations to support end-to-end procurement and payment processes. These products include capabilities such as ERP integration, a supplier portal, and task orchestration across procurement, finance, and supplier teams.

Product	Description
Sourcing and Procurement Operations	Streamlines sourcing and procurement workflows, improves spend visibility, and reduces cycle times.
Supplier Lifecycle Operations	Manages supplier onboarding, offboarding, and lifecycle activities with centralized supplier information, collaboration, and governance.
Accounts Payable Operations	Automates invoice processing, matching, and approvals to reduce manual effort, errors, and payment delays.

Using Finance and Supply Chain workflows for supply chain outcomes

Organizations adopt Finance and Supply Chain workflows based on business goals. Common outcomes include:

- Improved supplier collaboration and risk management
- Standardized sourcing, procurement, and purchasing processes
- Greater efficiency and visibility across procurement and payables
- Fewer manual handoffs between finance, procurement, and supplier teams

Together, these products enable a connected, workflow-driven approach to supply chain transformation.

Finance and Supply Chain applications

Provides information about the Finance and Supply Chain (FSC) applications.

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Common applications in FSC

Finance and Supply Chain (FSC) enhances operational efficiency by utilizing shared applications across multiple products and workflows.

The FSC common applications enhance process efficiency and streamline collaboration across these products:

- Sourcing and Procurement Operations
- Supplier Lifecycle Operations
- Accounts Payable Operations

Finance and Supply Chain includes the following common applications:

- Finance Common Architecture [sn_fin]
- ERP Integration Framework [sn_fcms_integrations]

> **Important:** Check your entitlements to determine whether you have access to ERP Integration Framework.

- Common Service Delivery [sn_spend_sdc]
- Source-to-Pay Common Architecture [snc.sn_shop]
- Source-to-Pay Integration Framework [sn_spend_intg]

To learn more about each application, see Learn about FSC common applications.

Request apps on the Store

Visit the ServiceNow Store 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.

Learn about FSC common applications

Learn about the FSC common application plugins and their dependencies.

FSC common application plugins

Plugin name	Description	Dependencies	Mandatory/ Optional
Finance Common Architecture [sn_fin]	Maintains primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on.	• Finance Applications – Common Dependencies [com.snc.fin_dep] • Fiscal Calendar [com.snc.fiscal_calendar] • Scoped Application Restricted Caller Access [com.glide.scope.access.restricted_caller] • Insert Multiple Web Service [com.glide.web_service_insert_multiple]	Mandatory

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FSC common application plugins (continued)

Plugin name	Description	Dependencies	Mandatory/ Optional
	For more information about the components installed with this plugin, see Components installed with Finance Common Architecture.		
ERP Integration Framework [sn_fcms_integrations] **Important:** Check your entitlements to determine whether you have access to ERP Integration Framework.	Provides integration support between the Platform and common ERP systems. For more information about the components installed with this plugin, see Components installed with ERP Integration Framework.	• Scoped Application Restricted Caller Access [com.glide.scope.access.restricted_caller] • Insert Multiple Web Service [com.glide.web_service_insert_multiple]	Mandatory
Common Service Delivery [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 [com.glide.pad.core] • Process Automation Designer for App Engine [com.glide.pad.license] • Playbook Experience [com.playbook_experience]	Mandatory

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FSC common application plugins (continued)

Plugin name	Description	Dependencies	Mandatory/ Optional
Source-to-Pay Common Architecture [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.	• Finance Common Architecture [com.sn_fin] • Common Service Delivery [com.sn_spend_sdc]	Mandatory
Source-to-Pay Integration Framework [sn_spend_intg]	Provides a set of staging tables, transform maps, and workflows to integrate Source-to-Pay Operations with third-party ERP system.	Source-to-Pay Common Architecture [com.snc.sn_shop]	Mandatory

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

Roles in Finance Common Architecture

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

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Roles in Finance Common Architecture (continued)

Role title [name]	Description	Contains roles
	and fiscal periods.	
Accountant [sn_fin.accountant]	Perform day-to-day accounting tasks and view financial records.	fiscal_calendar_user
Finance access admin [sn_fin.finance_access_admin]	Configure and manage financial access controls.	None
Organization admin [sn_fin.organization_admin]	Provides read, write, create, and delete access to all organization tables.	None
Procurement primary data admin [sn_fin.procurement_primary_data_admin]	Manage core procurement reference data.	None
Procurement user [sn_fin.procurement_user]	Access standard procurement records and processes.	None
Supplier payment info read [sn_fin.supplier_payment_info_read]	Provides read access to supplier payment tables.	None
Supplier payment info write [sn_fin.supplier_payment_info_write]	Provides read and write access to supplier payment tables.	sn_fin.supplier_payment_info_read
Tax manager [sn_fin.tax_manager]	Provides create, read, and update access to the Tax Code and Tax Type tables.	None

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Tables installed

Tables installed in Finance Common Architecture

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.
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.

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Tables installed in Finance Common Architecture (continued)

Table	Description
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.
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.

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Tables installed in Finance Common Architecture (continued)

Table	Description
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.
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.
Base Invoice Line [sn_fin_base_invoice_line]	Stores individual line items associated with a base invoice, such as item, quantity, and amount details.

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Tables installed in Finance Common Architecture (continued)

Table	Description
Buyer Group [sn_fin_buyer_group]	Defines groups used to organize buyers and manage procurement assignment responsibilities.
Buyer Group Member [sn_fin_buyer_group_member]	Maps individual buyers to a buyer group.
Jurisdiction [sn_fin_jurisdiction]	Defines the tax or legal jurisdictions applicable to financial and procurement transactions.
Organization Category [sn_fin_organization_m2m_category]	Maps organizations to categories used for classification and reporting.
S2P Custom Configuration [sn_fin_s2p_custom_config]	Stores custom configuration settings used in source-to-pay (S2P) processes.
S2P Custom Configuration Type [sn_fin_s2p_custom_config_type]	Defines the types of custom configuration available for source-to-pay (S2P) processes.
Supplier third-party [sn_fin_supplier_third_party]	Stores information about third parties associated with a supplier.

Components installed with ERP Integration Framework

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

Roles installed

Roles installed for ERP Integration Framework

Role title [name]	Description	Contains roles
Integration user [sn_fcms_intg.integration_user]	Configure integration setup for the applications (SPO, SLO, or APO) with ERP.	None

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Scheduled jobs installed

Scheduled jobs for ERP Integration Framework

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

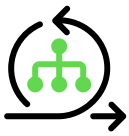
Tables installed for ERP Integration Framework

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 applications (SPO, SLO, or APO) when they are granted the corresponding role in ERP.
ERP User Mapping [sn_fcms_intg_erp_user_map]	Stores ServiceNow and ERP User ID mapping that is required for integration to work. The mapping is maintained for all active users who have the journal preparer or approver role in ERP.
Park Post Response [sn_fcms_intg_parkpostresponse]	Stores the park and post response from ERP.
Reverse Response [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 application (SPO, SLO, or APO) 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.

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Finance Case Management

The ServiceNow® Finance Case Management application enables your employees and finance teams to raise, track, and resolve finance-related requests.

Explore  Learn about the benefits and features of Finance Case Management.	Configure  Plan and configure your implementation.
Use  Work on finance requests, and manage finance cases, tasks, knowledge articles, and interactions.	Reference  Get details about components, such as fields, tables, and properties.

Next Experience themes

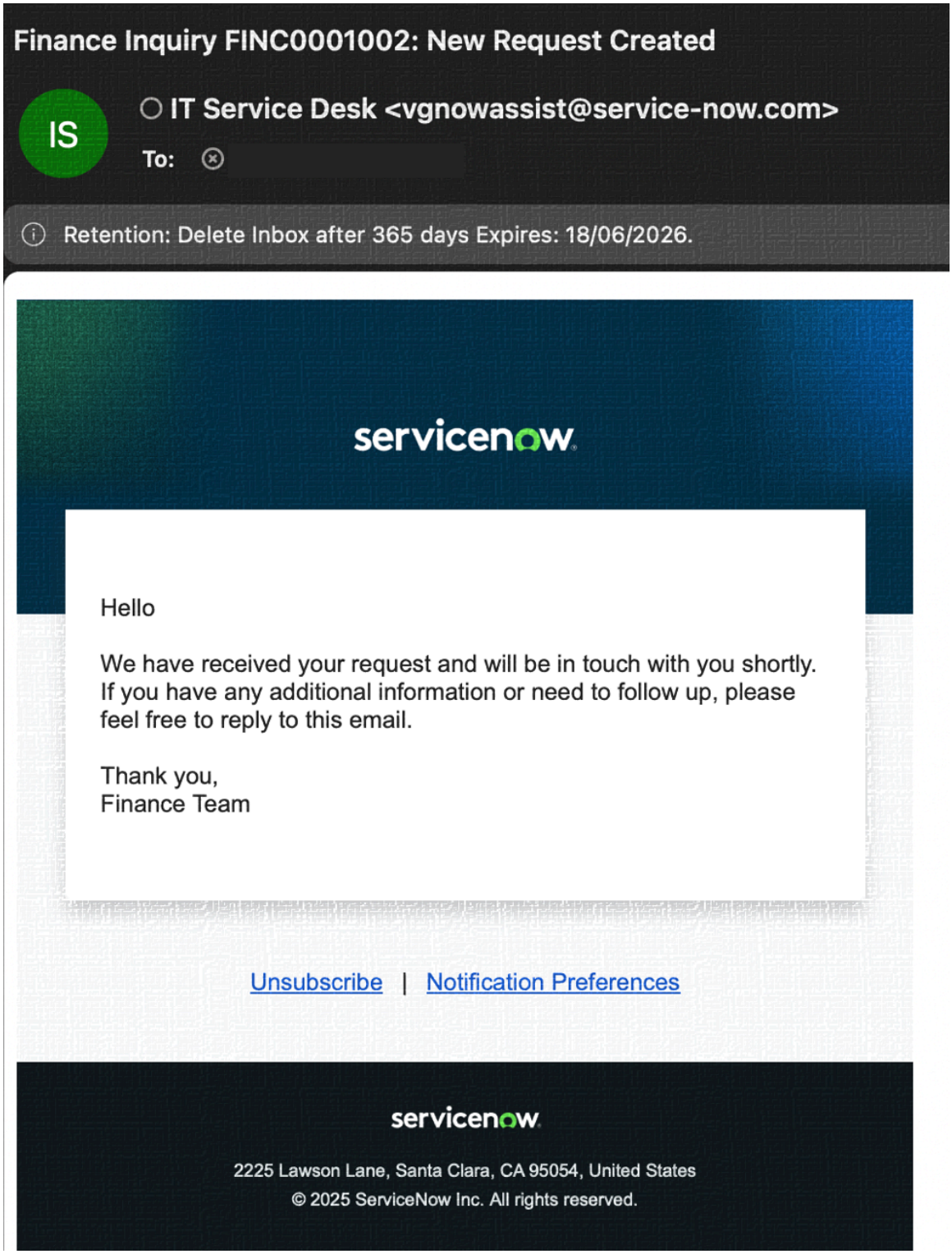
As part of the Next Experience default theme provided by the ServiceNow platform, new customers will have the Next experience coral theme enabled by default in their instance. All the email notification templates in Finance Case Management are coral themed.

The dark theme emits less blue light, making the display easier for your eyes and less disturbing in low-light settings. The dark theme is supported for configurable workspaces, lists, forms, dashboards, and reports.

For more information on customizing coral theme, see Working with themes in Next Experience.

Here is an example of the email notification template with coral theme:

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Explore Finance Case Management

Learn about the benefits and capabilities of Finance Case Management.

Benefits

Finance Case Management offers the following benefits:

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- Deflect cases by providing process guidance and knowledge articles.
- Improve case routing so that finance specialists handle only the relevant inquiries, saving time.
- Shorten response times by streamlining finance-related inquiries.

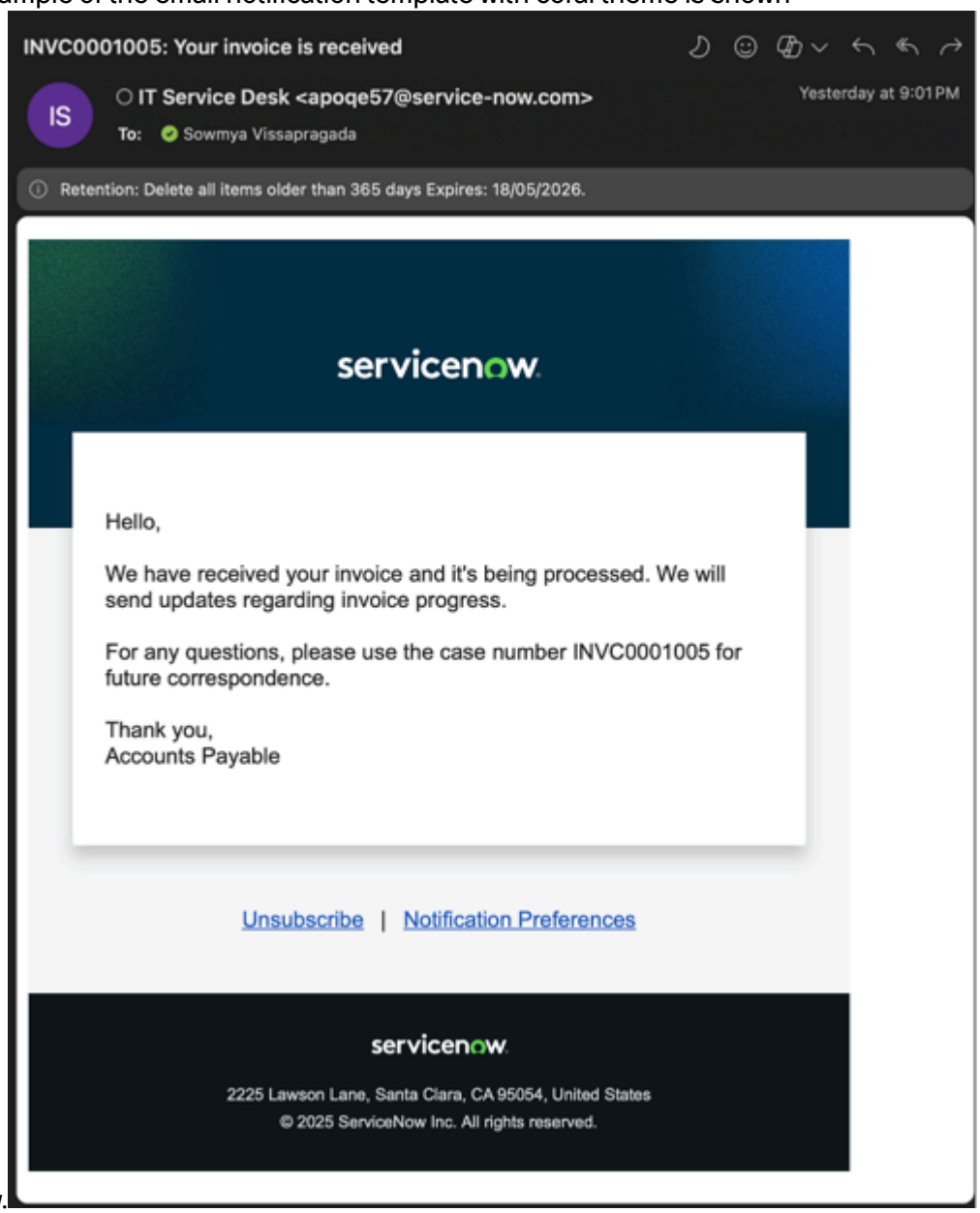
Themes

As part of the Next Experience default theme provided by the ServiceNow platform, new customers will have the Next experience coral theme enabled by default in their instance. All the email notification templates in Accounts Payable Operations are coral themed.

The dark theme emits less blue light, making the display easier for your eyes and less disturbing in low-light settings. The dark theme is supported for configurable workspaces, lists, forms, dashboards, and reports.

For more information on customizing coral theme, see Working with themes in Next Experience.

An example of the email notification template with coral theme is shown below.



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Finance Case Management applications

Finance Case Management uses the following applications:

Employee Center

The Employee Center provides a self-service option for finance inquiries and requests. This enables employees to manage tasks related to finance requests, and provides visibility and transparency of finance processes.

Finance Operations Workspace

Finance Operations Workspace provides a single system of action to manage and prioritize work. The application displays critical information to prioritize work, and it eliminates tool sprawl.

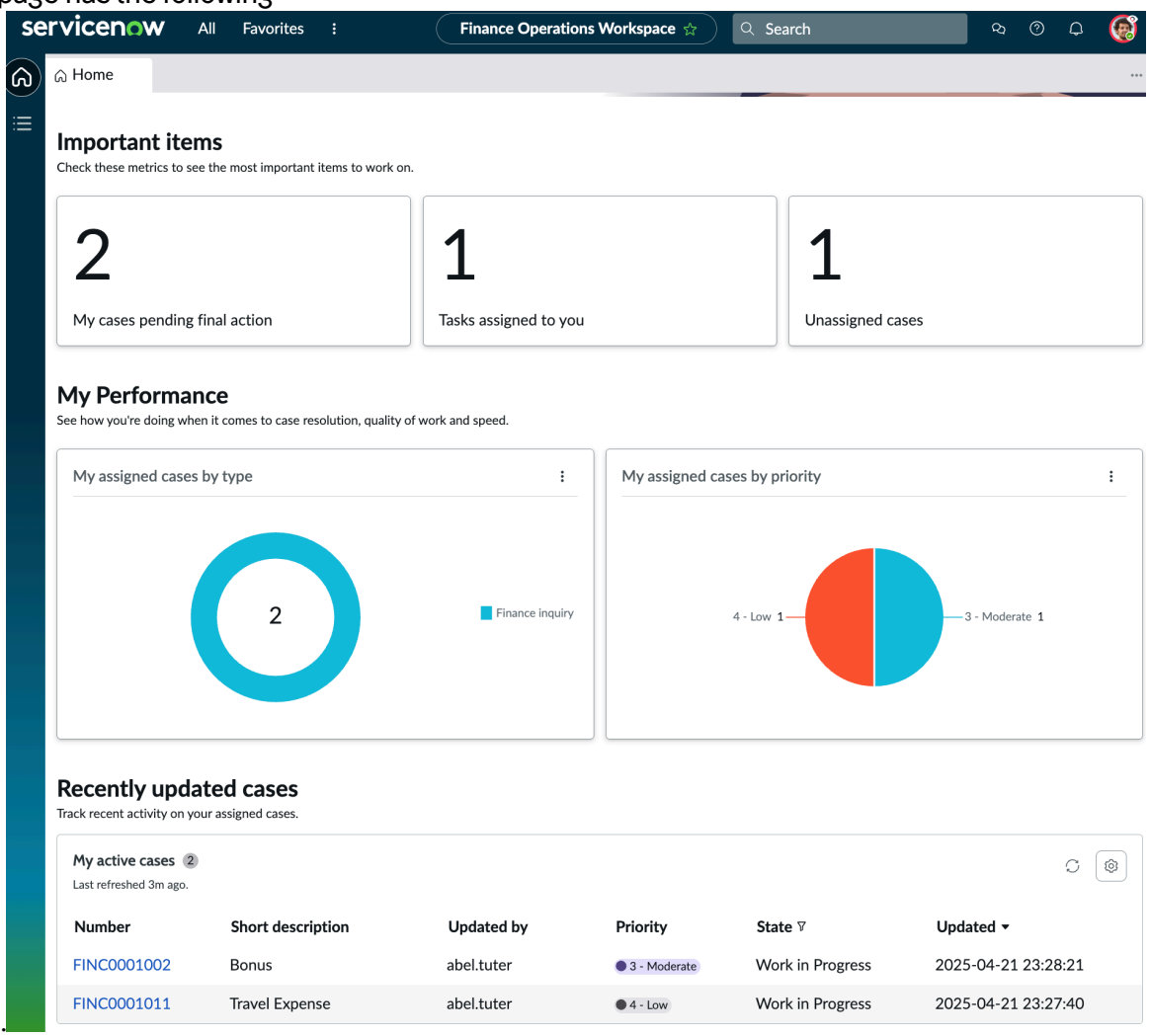
Explore the Finance Operations Workspace

The Finance Operations Workspace is a single system to manage and prioritize work.

Finance Operations Workspace landing page

As a Finance Specialist (sn_fin_ops.specialist), view a summary of the important items, your performance, and recent activities on your cases.

The landing page has the following components.



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Components in the Finance Operations Workspace landing page

Component	Description
Important items	
Cases pending final action	View the cases that need a final action. The pending cases are displayed with the case number, requested by, assignment group, assigned to, state, priority, and date of creation fields.
Tasks assigned to you	View the active tasks assigned to you.
Unassigned cases	View the list of unassigned cases.
My performance	
My assigned cases by type	A visual representation of the active cases assigned to you, grouped by case type. Select each segment to view the list of cases.
My assigned cases by priority	A visual representation of the active cases assigned to you, grouped by priority. Select each segment to view the list of cases.
Recently updated cases	
My active cases	View up to five of your active cases. Select **View all** to view all your active cases. The finance cases open in the Finance Operations Workspace, while the other cases and tasks that you have access to open in the Source-to-Pay Workspace.

Finance Operations Workspace list page

View a high-level information of all records in a list filter from the Finance Operations Workspace list page.

In the Finance Operations Workspace, select the List icon  to open the List page.

You can select each module and submodule 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**.

Note: The List menu component is configured by admins in UI Builder. For information on List menu component configurations, see List menu UIB Setup.

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As a finance specialist, you have access to the following modules and submodules:

Modules and submodules

Modules	Submodules
My work	• Open cases • Open tasks • Open interactions
Review needed	• Unassigned cases • Unassigned tasks
All work	• Cases • Closed cases • Tasks • Closed tasks • Interactions • Closed interactions
Interactions	• All • Active • Assigned to me
Primary data	Cost center
Knowledge	Finance articles

View a case from Finance Operations Workspace

View a case from the Finance Operations Workspace for further processing.

Before you begin

Role required: sn_fin_ops.specialist

Procedure

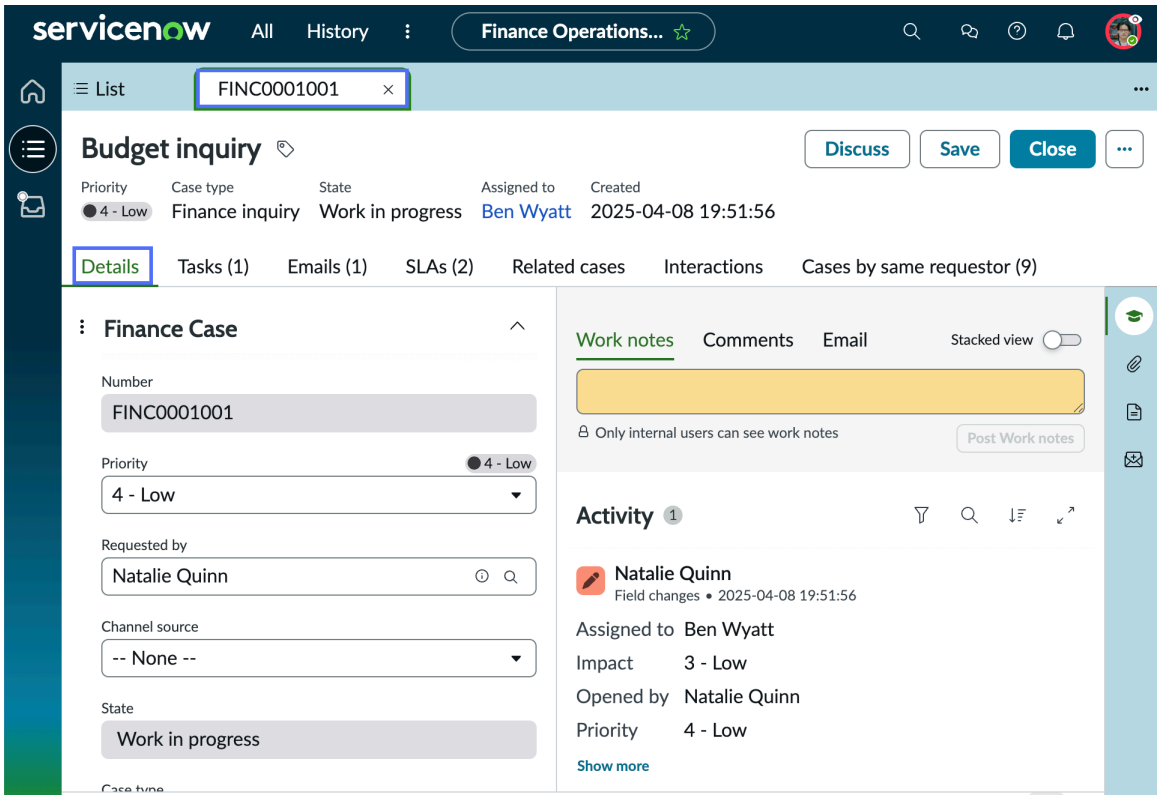
1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations Workspace, select the List icon  to open the List page.
3. From the list page, navigate to either of the following submodules:

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- **My work > Open cases**
- **All work > Cases**

4. Select a case number link from the Number column.

Result
The details of finance cases are displayed on the **Details** tab of the Finance Operations Workspace. For more information, see Finance Operations Workspace Case Details page.



If you have access to the Source-to-Pay Workspace, you can see invoice, procurement, and supplier cases in the list. If you open any of these cases, the details of the case are displayed in the Source-to-Pay Workspace.

Finance Operations Workspace Case Details page

The Finance Operations Workspace Case Details page is displayed when you select the link of a finance case.

On the Finance Operations Workspace, navigate to **Lists** > **My work** > **Open cases**. Select a case number link from the Number column to open the Finance Case Details page.

The Finance Case Details page contains the following options:

Finance Case Details page

Option	Description
Multi-tab interface	For each finance case, the details are displayed in tabs. For more information, see Finance Case form tabs

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Finance Case Details page (continued)

Option	Description
Compose	• Work notes (Private): Enter information that must be private to the logged-in user. • Comments: Enter details that are visible to everyone. • Email: Send emails related to the finance case. For more information on sending emails, see Send emails from Finance Operations Workspace
Activity stream	Displays processing activities, comments, and changes to the state of the case. You can filter activities by post types, field changes, and flagged activities.
Contextual side panel	Includes options to access Agent assist and add attachments related to the finance case.

Send emails from Finance Operations Workspace

Send emails related to a specific finance case.

Before you begin

Role required: sn_fin_ops.specialist

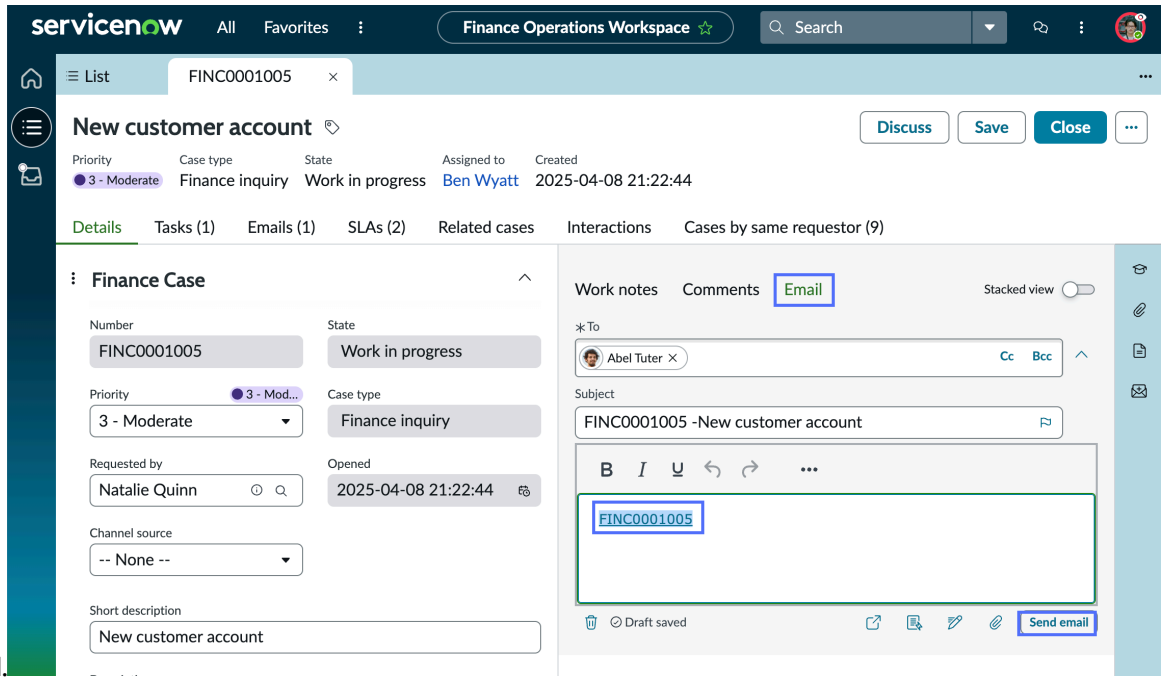
Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  .
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. From the Compose section, select **Email**.
5. Enter the recipient name in the **To** field.
   You can also select **Cc** or **Bcc** and enter the names.
6. Change the subject, if necessary.
   By default, the subject is the finance case number and the short description.
7. Enter the email body, if necessary.

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By default, the email body contains the link to the finance case. You can also use the email templates. For more information on email templates, see Email templates.

8. Select **Send mail**.



Result

The email is sent to the recipients. You can view the details of the sent email in the **Emails** tab.

Agent assist in Finance Operations Workspace

Agent assist displays relevant search results based on the search text. The text is defaulted with the short description of the finance case you're working on.

Agent assist is part of the contextual side panel in the Finance Operations Workspace. By default, it displays resolved finance cases. You can edit the search text, as required. These search results help you to work on the record.

For resolved finance cases, the card displays the following:

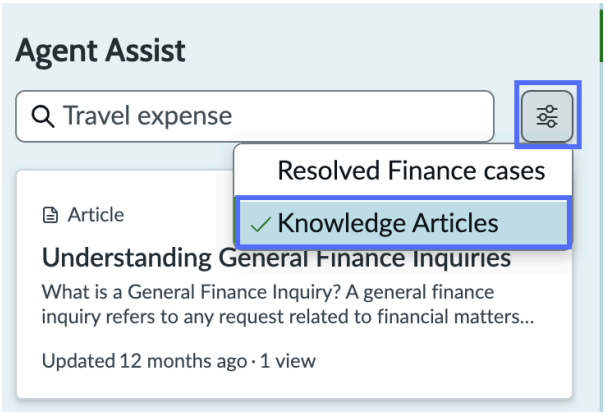
- Short description of the finance case
- Finance case number
- Current state of the finance case
- The person to whom the finance case is assigned

Select the card to view the following additional details of the case:

- Date when the case was opened
- Priority of the finance case
- Group to which the finance case is assigned
- Person to whom the finance case is assigned
- Reason for closing the finance case

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You can also search for knowledge articles. Select the search resource icon  and select **Knowledge Articles** to view the articles.



The Agent assist component is configured and customized by admins in UI Builder. For more information about Agent assist component configurations, see Agent assist UIB setup.

Interaction management in Finance Operations Workspace

Any finance request made through chat is logged in an auto-generated interaction record. Specialists can choose to create a case from the interaction record, create a request, and associate an interaction record with an existing finance case record.

The **Details** tab of an interaction record contains details of the interaction.

For more details on the fields, see Interaction form.

Finance Operations Workspace inbox

Use the inbox to manage your incoming work items, such as chats and cases.

To open the agent inbox, select the Inbox icon () in the Finance Operations Workspace.

The 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.

When you accept a chat, an interaction record is automatically created. The record captures the work done in that session.

Create a new interaction

An interaction record is automatically created when you accept a chat through the chat queue in the Finance Operations Workspace. You can also manually create an interaction from the list page of the Finance Operations Workspace.

Before you begin
Role required: sn_fin_ops.specialist

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Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  .
3. From the list page, navigate to either of the following submodules:
   - **Interactions** > **All**
   - **Interactions** > **Active**
   - **Interactions** > **Assigned to me**
4. Select **New**.
5. On the form, fill in the fields.
   For more information on the form fields and descriptions, see Interaction form
6. Select **Save**.

Create a finance case from an interaction

An interaction record is automatically created when you accept a chat through the chat queue in the Finance Operations Workspace. You can create a finance case from an interaction record for further investigation.

Before you begin

Role required: sn_fin_ops.specialist

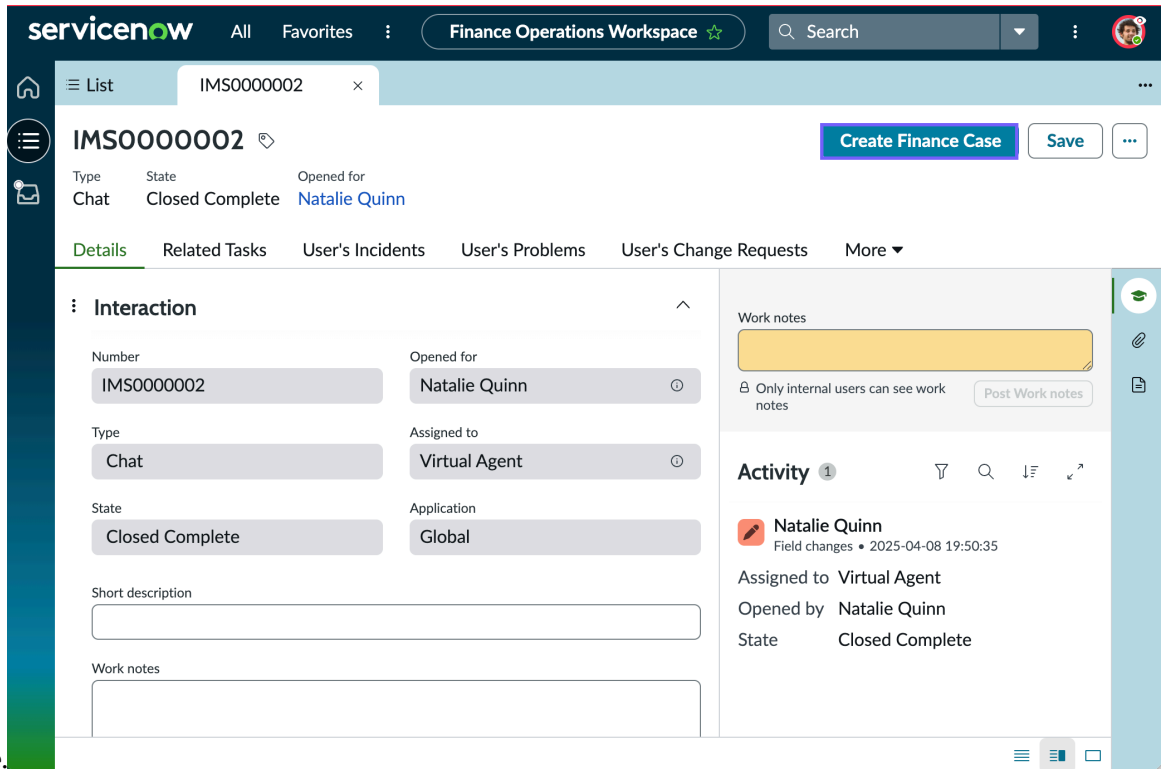
Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  .
3. From the list page, navigate to either of the following submodules:
   - **Interactions** > **All**
   - **Interactions** > **Active**
   - **Interactions** > **Assigned to me**
4. From the Number column, select a link to open an interaction record.

   For more information on the fields in an interaction record, see Interaction form.

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5. Select **Create Finance Case**.



For more information on the form fields and descriptions, see Create a finance case.

6. Select **Save**.
   A new finance case is created. For information on viewing finance cases, see View a case from Finance Operations Workspace

Associate an interaction with a finance case

Associate an interaction record to a finance case, if the interaction is related to an existing finance case.

Before you begin

Role required: sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon ( ).
3. From the list page, navigate to either of the following submodules:
   - **Interactions** > **All**
   - **Interactions** > **Active**
   - **Interactions** > **Assigned to me**
4. From the Number column, select a link to open an interaction record.

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5. Select the More actions icon  .
6. Select **Associate Record**.
7. On the Create New Interaction Related Record form, fill in the fields.
   For more information on the form fields and descriptions, see Create new interaction related record form.
8. Select **Save**.

Process Automation Designer flows for playbook

Workflow Studio Playbooks enables you, as a business playbook owner, to organize Workflow Studio content into unified and digitized cross-enterprise processes.

You can customize the Playbook experience with your own configurations and activity overrides. The automated business processes that you design guide your end users and help them focus on the tasks and information that matter to them.

For information on Playbooks, see Playbooks.

Configure Finance Case Management

Plan and configure your implementation for Finance Case Management.

Install Finance Case Management

Install the Finance Case Management application (sn_fin_ops) if you have the admin role. The application includes demo data and installs related ServiceNow® Store 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 Finance Case Management listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Finance Case Management:

- Plugins
- Roles
- Tables

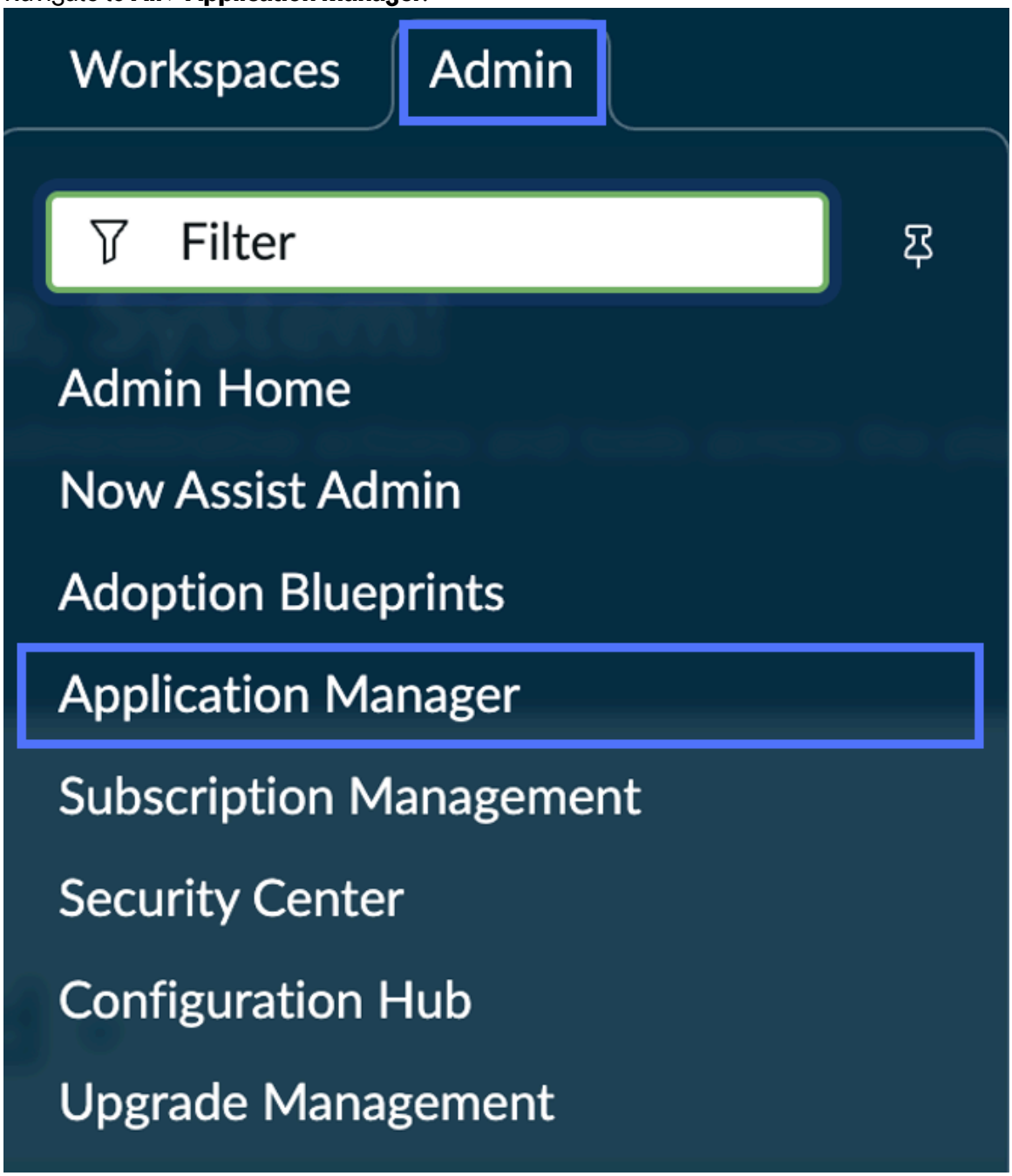
The Finance Case Management application (sn_fin_ops) installs the following dependent plugins:

- Finance Operations Workspace (sn_fin_ops_ws)
- Common Service Delivery (sn_spend_sdc)

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Procedure

1. Navigate to **All** > **Application Manager**.



2. Find the Finance Case Management application (sn_fin_ops) 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.

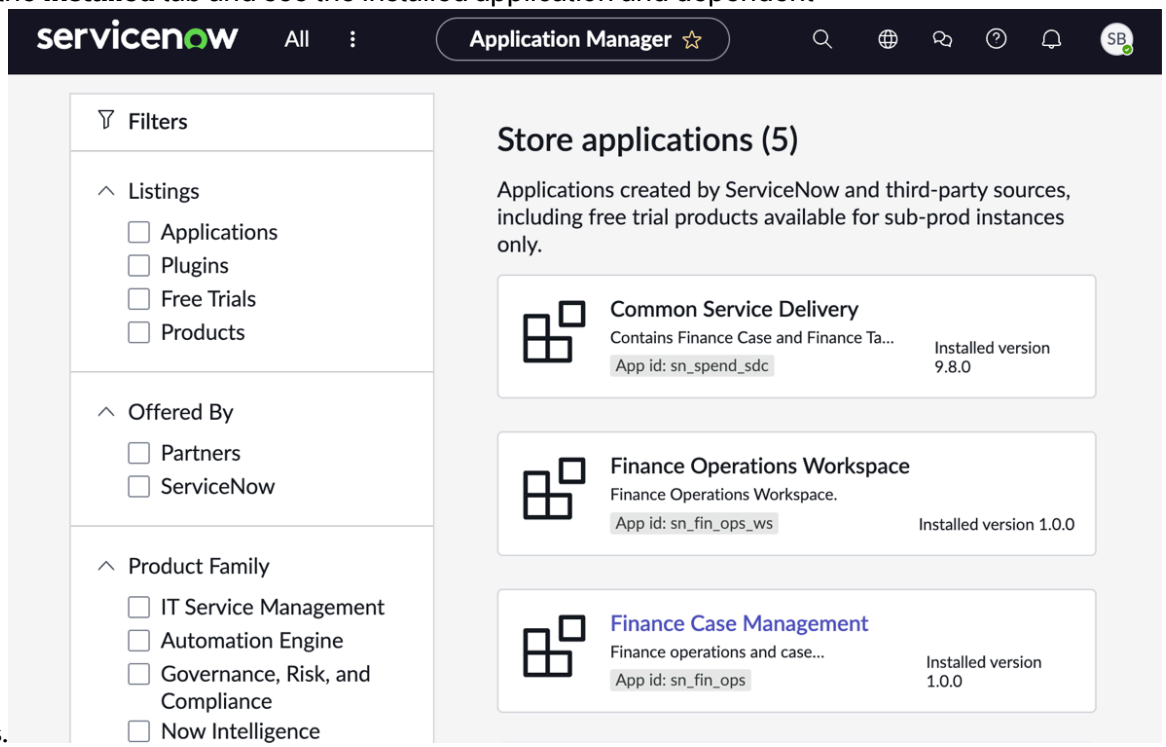
   In the list next to the **Install** button, the versions that are available to you are displayed.

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.

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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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.
   Select the **Installed** tab and see the installed application and dependent plugins.



Components installed with Finance Case Management

Several types of components are installed with the activation of the Finance Case Management plugin, including roles, flows, and tables.

Roles installed

The following roles are installed with Finance Case Management:

List of roles installed

Role title [name]	Description	Contains roles
sn_fin_ops.admin	Can access all the features and capabilities of Finance Case Management, including Finance Operations workspace	• sla_admin • sn_fin_ops.specialist
sn_fin_ops.requester	Can create finance-related cases	
sn_fin_ops.specialist	Can view and update the finance-related cases	• sn_fin_ops.requester • workspace_user

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List of roles installed (continued)

Role title [name]	Description	Contains roles
		• canvas user • email_composer
sn_fin_ops.task_owner	Can view and update the tasks associated with the finance case	

Tables installed

No new tables are installed with Finance Case Management. However, the labels of the following tables are changed:

List of tables installed

Table	New label	Description
sn_spend_sdc_service_request	Finance case	Stores the finance cases
sn_spend_sdc_service_request_line	Finance case lines	Represents individual items or components related to the finance case
sn_spend_sdc_service_task	Finance task	Stores the finance tasks

Application plugin installation sequence in Finance Case Management

View the consolidated list of plugins, high-level description of each plugin, and the dependencies that are required before installing each plugin in Finance Case Management.

Application plugin list

Plugin name	Description	Dependencies
Finance Common Architecture (sn_fin)	Maintains primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on.	-
Common Service Delivery (sn_spend_sdc)	Contains Finance Case, Finance Case Line, and Finance Task.	Finance Common Architecture (sn_fin)
Finance Operations Workspace (sn_fin_ops_ws)	Provides a single environment for finance specialists to work on finance cases, finance tasks, and more.	-

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Plugin name	Description	Dependencies
Finance Case Management (sn_fin_ops)	Maintains primary data to raise, track, and resolve finance-related requests.	• Finance Common Architecture (sn_fin) • Common Service Delivery (sn_spend_sdc) • Finance Operations Workspace (sn_fin_ops_ws)
Source-to-Pay Common Architecture (snc.sn_shop)	Maintains primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on.	• Finance Common Architecture (sn_fin) • Common Service Delivery (sn_spend_sdc)
Advanced Work Assignment for Source-to-Pay Operations (snc.sn_spend_awa)	Provides configurations to support automatic routing, queuing, and assignment of finance cases and emails.	Advanced Work Assignment (glide.awa)

Activate the Create Finance Inquiry for inbound email flow

Activate the **Create Finance case on Inbound email inquiry** flow to create a finance inquiry case automatically based on the information in an inbound email.

Before you begin

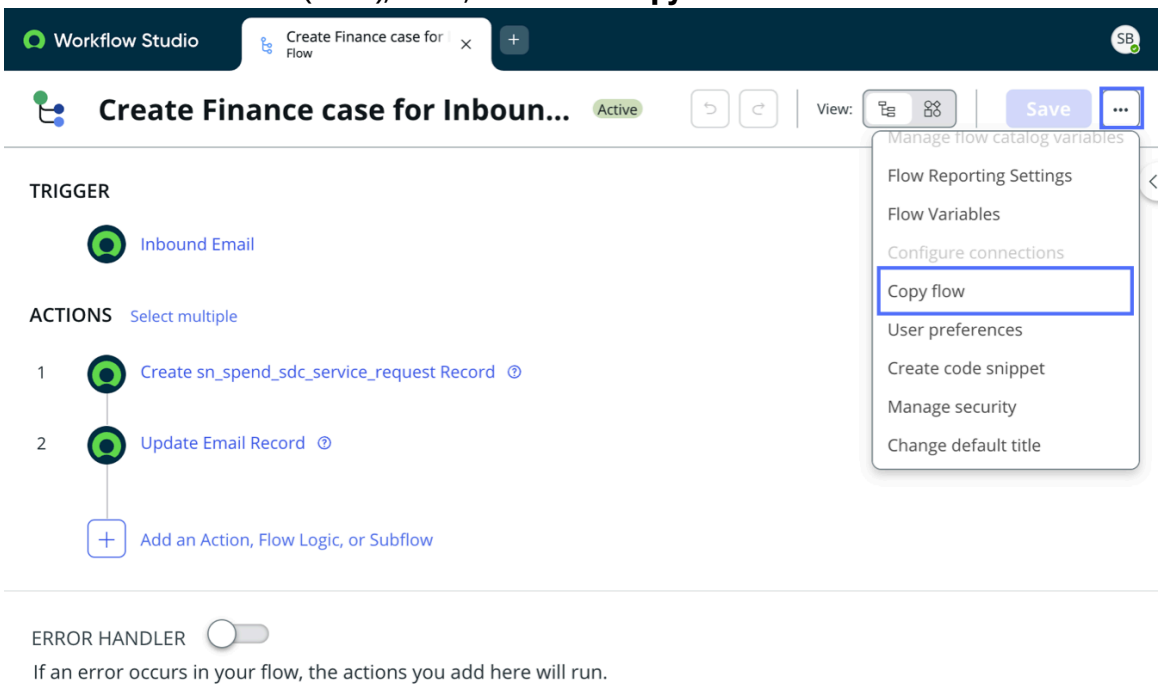
Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and select the **Create Finance case on Inbound email inquiry** flow to open it.

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3. Select the more actions icon ( ), scroll, and select **Copy**

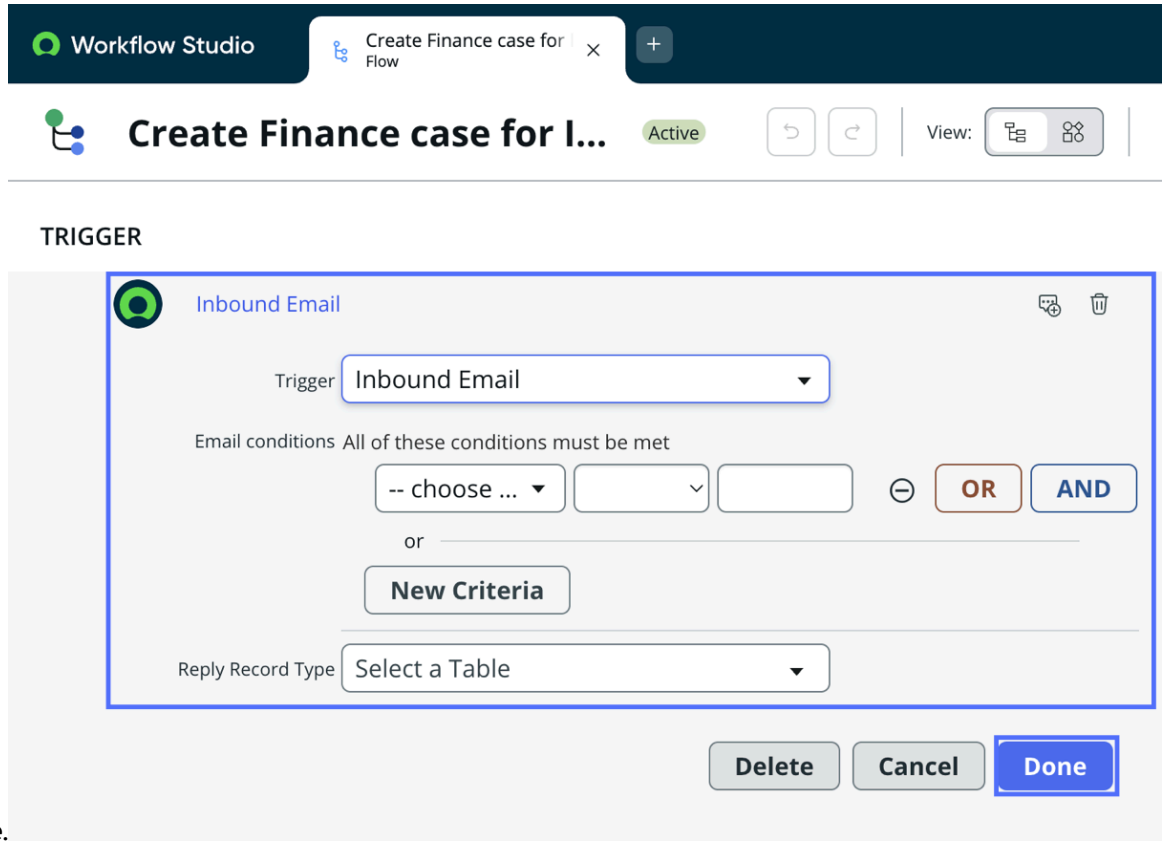


flow.
The Create a copy of this flow dialog box is displayed.

4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Finance Case Management**.
6. Select **Copy**.
   A copy of the flow opens.
7. Under TRIGGER, specify the conditions that trigger this flow.

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8. Select



Done.

9. Save and select **Activate**.
   The **Create Finance case on Inbound email inquiry** flow is activated and a finance inquiry case is created automatically based on the information in an inbound email.

Configure Finance Operations Workspace

Plan and configure your implementation for Finance Operations Workspace.

Configure the Finance Operations Workspace landing page

Configure the landing page of the Finance Operations Workspace

Use UI Builder to configure the landing page, define different audiences for the landing page, and even add, remove, or modify the different content However, it's recommended that you create a duplicate of the landing page before modifying it.

For more information on how to configure using UI Builder, see Create a page in UI Builder.

Configure knowledge bases from the Finance Operations Workspace

Configure a knowledge base so that guest users can publish the knowledge base articles from the Finance Operations Workspace.

Enable guest users to publish knowledge base articles from the Finance Operations Workspace

To enable guest users to publish a knowledge article, add them to the Can Read list of the corresponding knowledge base in the Finance Operations Workspace.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Knowledge** > **Administration** > **Knowledge Bases**.
2. Select the knowledge base that you want to configure.
   For example, select **Finance Case Management Knowledge base**.
3. On the Can Read related list, select **Edit**.
4. In the Collection list, search for the **Finance Operations Users** role.
5. Move the **Finance Operations Users** role from the Collection list to the Can Read list.
6. Select **Save**.
   A guest user can now publish a knowledge article from the Finance Operations Workspace.

Publish a knowledge base article

After creating a knowledge base article, publish the article from the Finance Operations Workspace

Before you begin

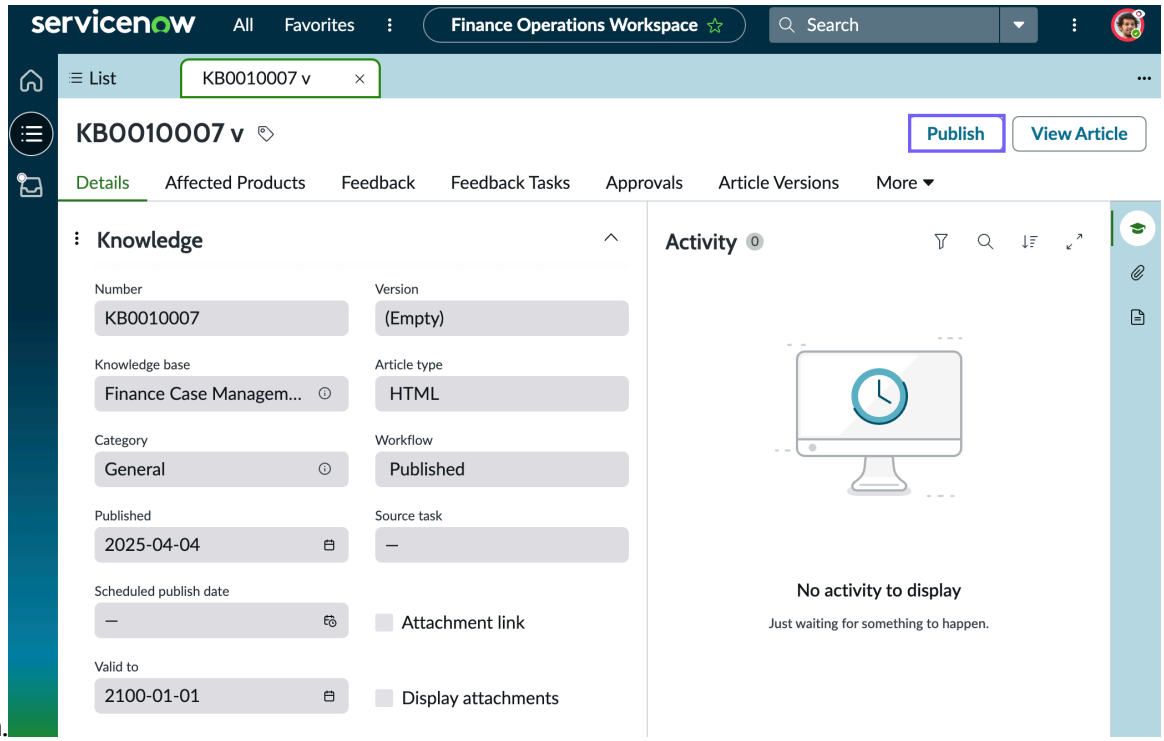
Role required: admin

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. Select the list icon 
3. Navigate to **Lists** > **Knowledge**, and then select **Finance articles**.
4. Under the Number column, select the link to a knowledge base article to open it.

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5. Select



Publish.
A confirmation message appears, notifying you that the article is published.

UseFinance Case Management

Finance specialists can create, track, and resolve finance requests efficiently.

Use the Employee Center

Finance requesters can use the Employee Center to create finance inquiry, view the requests and tasks, and interact with the live agent.

Submit a finance request from Employee Center catalog

Ask any general finance-related question.

Before you begin

Role required: sn_fin_ops.requester/ sn_cbs.requestor

Note: The sn_cbs.requestor role is for you to access the finance request form in the Core Business Suite application.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Finance**.
3. Select **Finance request**.
4. On the form, fill in the fields.

Submit finance request form

Field	Description
Briefly, what is your request about?	Short description of your request.

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Field	Description
What can we help you with?	Detailed description of your request.
Add attachments	Attachments related to your request.

5. Submit or save the request.
   - To submit the request, select **Submit**.
   - To save your request and modify later, select **Save as Draft**.

What to do next
Select **My Requests** to view and track the progress of your requests.

View finance articles

View finance articles from the Employee Center.

Before you begin
Role required: sn_fin_ops.requester, sn_fin_ops.specialist

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Finance**.
3. Select **Finance articles**.

Result
You can view the Understanding General Finance Inquiries knowledge article.

Using the Finance Operations Workspace

Finance Specialists can use the Finance Operations Workspace to manage cases, tasks, knowledge articles, or interactions.

Create a finance case

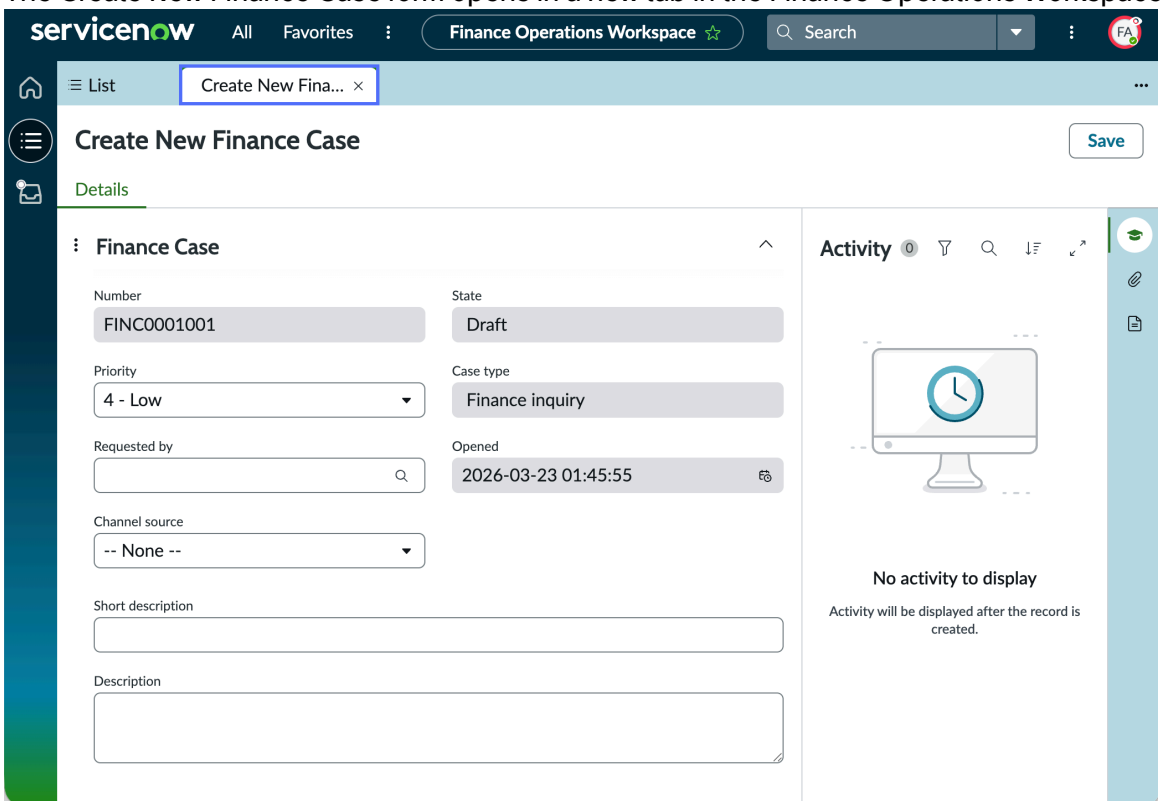
Create a finance case on behalf of a requester to track the progress.

Before you begin
Role required: sn_fin_ops.specialist

Procedure
1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  .
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. Select **New** from within a submodule.

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5. From the Case type drop-down list, select **Finance Inquiry**.
6. Select **Submit**.
   The Create New Finance Case form opens in a new tab in the Finance Operations Workspace.



Note: If you have access to Source-to-Pay Workspace and if you select a case type related to Source-to-Pay operations, the new form opens in a new browser tab in the Source-to-Pay Workspace.

7. On the Create New Finance Case form, fill in the fields.
   For more information on the form fields and descriptions, see Create a finance case form.
8. Select **Save**.
   A new finance case is created. For more information on viewing finance cases, see View a case from Finance Operations Workspace.

Assign a finance case to yourself

As a finance specialist, assign a finance case to yourself from the Finance Operations Workspace. Start resolving it.

Before you begin

Role required: sn_fin_ops.specialist

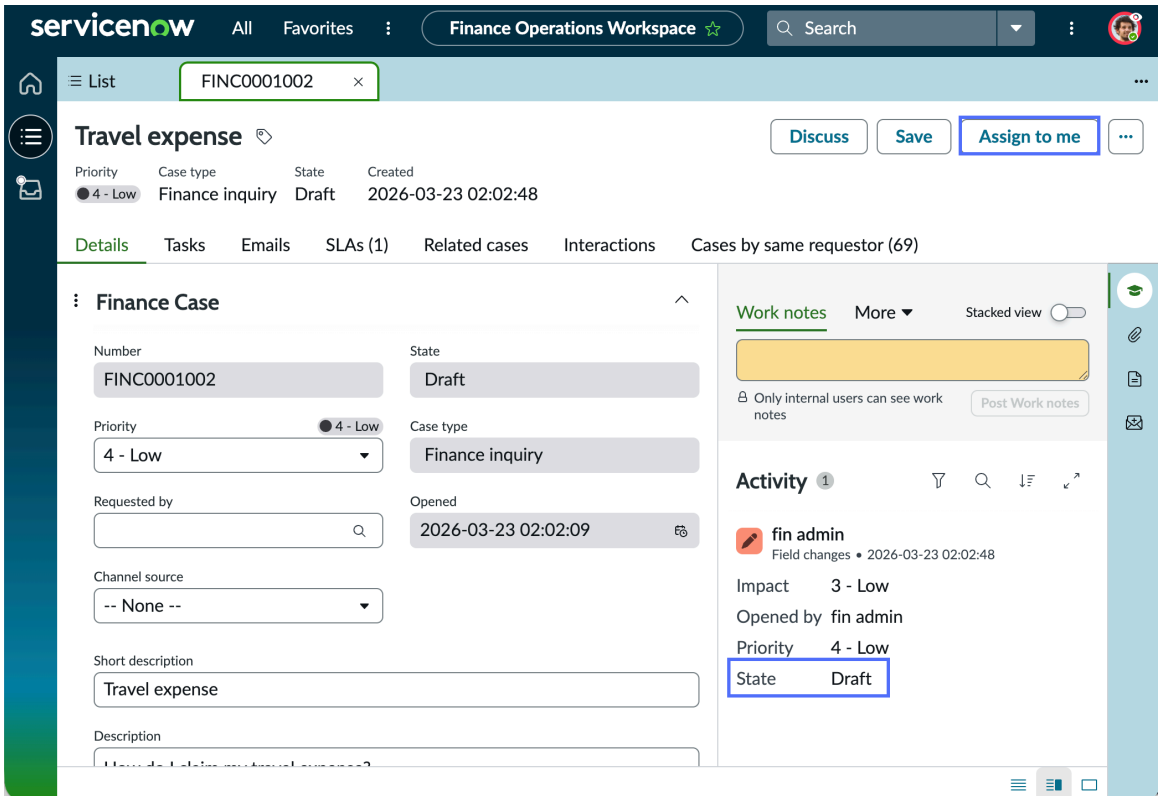
Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations Workspace, select the List icon  to open the List page.

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3. From the list page, navigate to either of the following submodules:
   - **Review needed** > **Unassigned cases**
   - **All work** > **Cases**
4. Select a case number link from the Number column.
5. Select **Assign to me**.

> **Note:** The **Assign to me** option is available only for unassigned cases that are in draft state.



The case is assigned to you and the state is Work in Progress.





6. Select **Save**.

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Accept a finance case

As a finance specialist, if a finance case is assigned to you, accept the case to start resolving it.

Before you begin

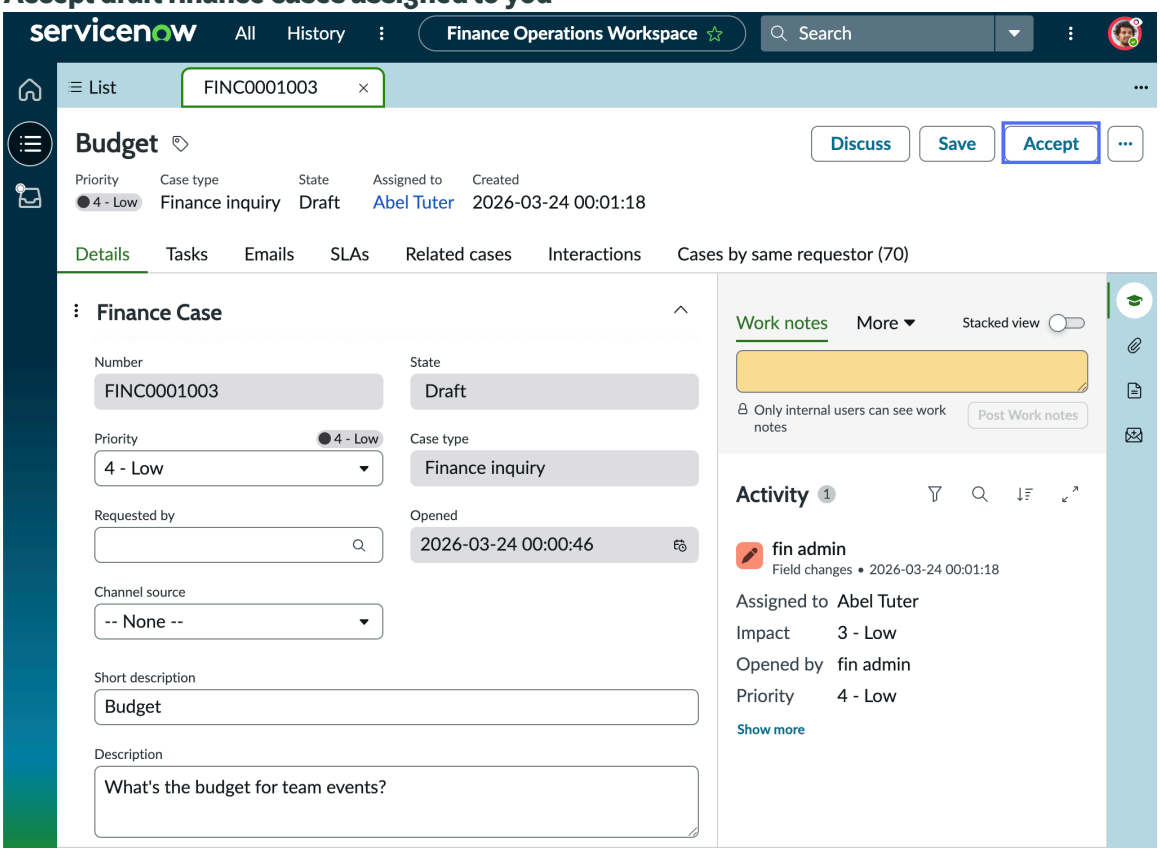
Role required: sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  to open the List page.
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. Select a case number link from the Number column.
5. Select **Accept**.

> **Note:** The **Accept** option is available only if the cases assigned to you are in the draft state.

Accept draft finance cases assigned to you



The state of the accepted case changes to Work in Progress.

6. Select **Save**.

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Request additional information for a finance case

Request additional information from the requester to continue working on the finance inquiry case.

Before you begin

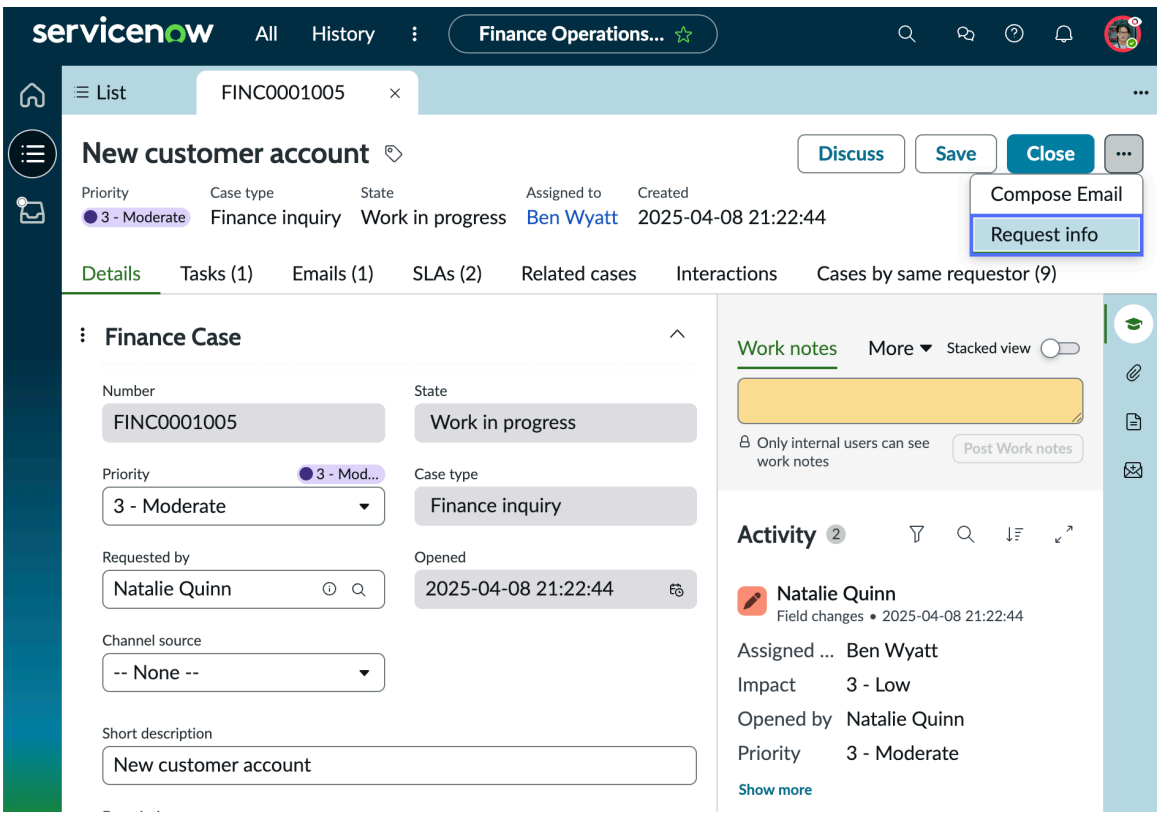
Role required: sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. From the list page, navigate to either of the following submodules:
   - **My work** > **Open tasks**
   - **All work** > **Tasks**
3. From the Number column, select a link to open the finance inquiry case.
4. Select the more actions icon 
5. Select **Request info**.

Note: The **Request info** option for a finance case is available only if:

- The case is assigned to you.
- The requester is available.
- The case is in Work in Progress state.



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6. In the Request Info dialog, provide the reason for requesting additional information.
7. Select **Request info**.

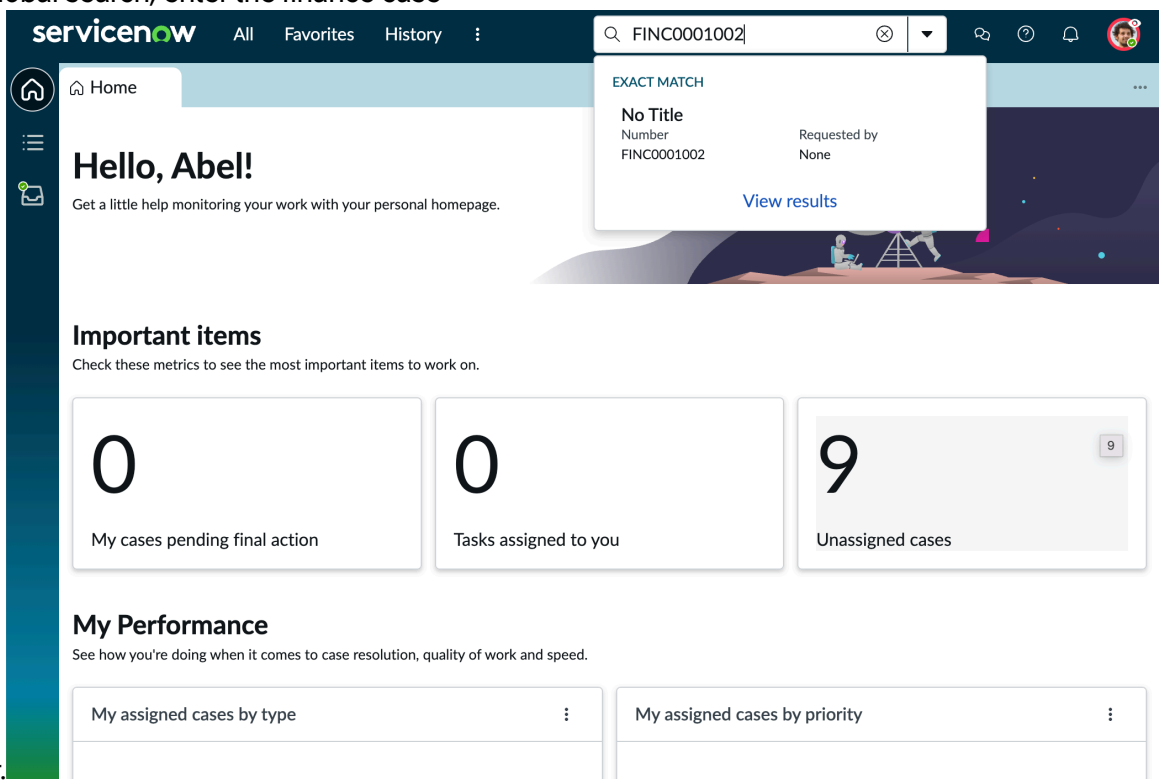
Result
You can see the reason in the activity stream. The requester receives an email requesting additional information.

Search for finance cases

As a finance specialist, search for finance cases from the Finance Operations Workspace.

Before you begin
Role required: sn_fin_ops.specialist

Procedure
1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the global search, enter the finance case number.



Note: If you have access to the Soure-to-Pay workspace, you can also search for relevant cases in that workspace.

Result
The search results show the finance case, if it exists.

Initiate sidebar discussions

Start a sidebar discussion to collaborate with stakeholders while working on a finance inquiry case.

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Before you begin

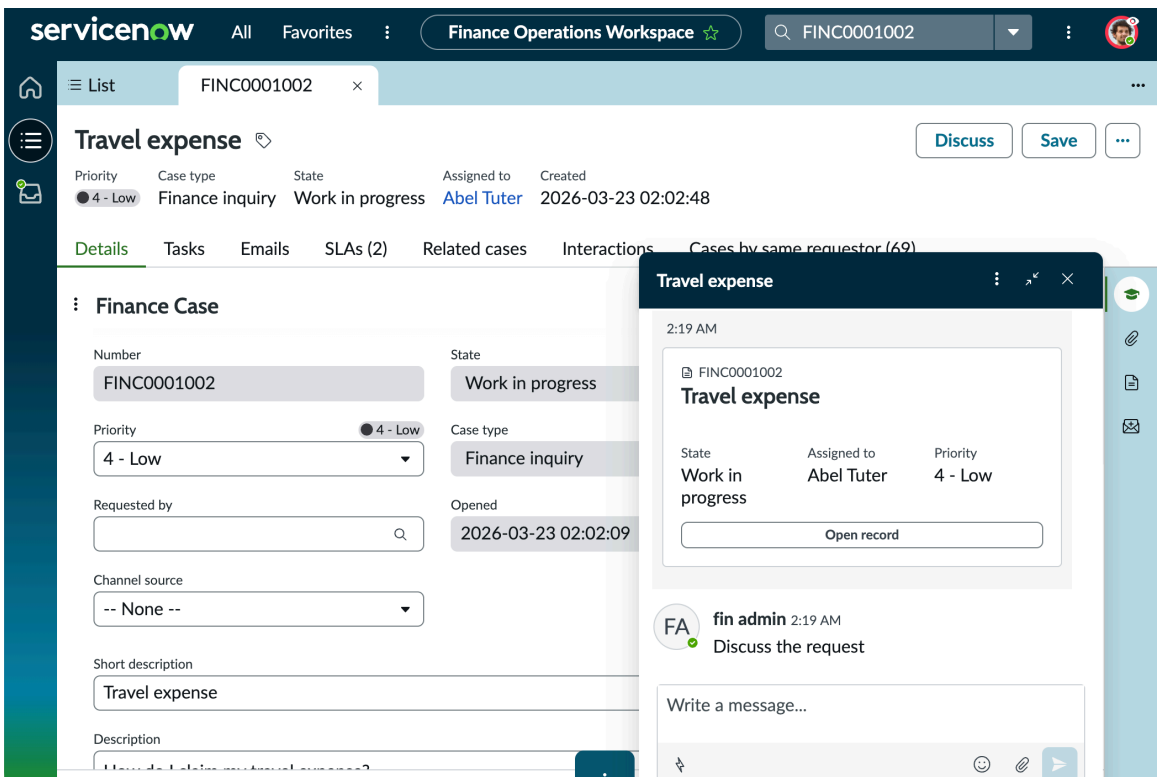
Role required: sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon  to open the List page.
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. Select a case number link from the Number column.
5. Select **Discuss**.
6. Add stakeholders to the discussion.
7. Select **Start discussion**.
   A new side bar discussion is initiated.

Result

The stakeholders are notified when you add them to a discussion. They can join the discussion by selecting the Sidebar discussions icon  .



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What to do next

For more information on the sidebar, see Sidebar.

To learn more about using the sidebar, see Using Sidebar.

For information on the activity stream in the sidebar is, see Activity stream in Sidebar.

Create a finance task

Create a finance task and associate it to a finance case.

Before you begin

Role required: sn_fin_ops.admin, sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon 
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open tasks**
   - **All work** > **Tasks**
4. Select **New** from within a submodule.
5. From the Case task drop-down list, select **Finance task**.
6. Select **Submit**.
   The Create New Finance Task form opens in a new tab in the Finance Operations Workspace.

   Note: If you have access to Source-to-Pay Workspace and if you select a task type related to Source-to-Pay operations, the new form opens in a new browser tab in the Source-to-Pay Workspace.
7. On the Create New Finance Task form, fill in the fields.
   For more information on the form fields and descriptions, see Create a finance task form.
8. Select **Save**.

Create a finance task from a finance case

Create a finance task from a finance case. Assign the task to a task owner or group to resolve that case.

Before you begin

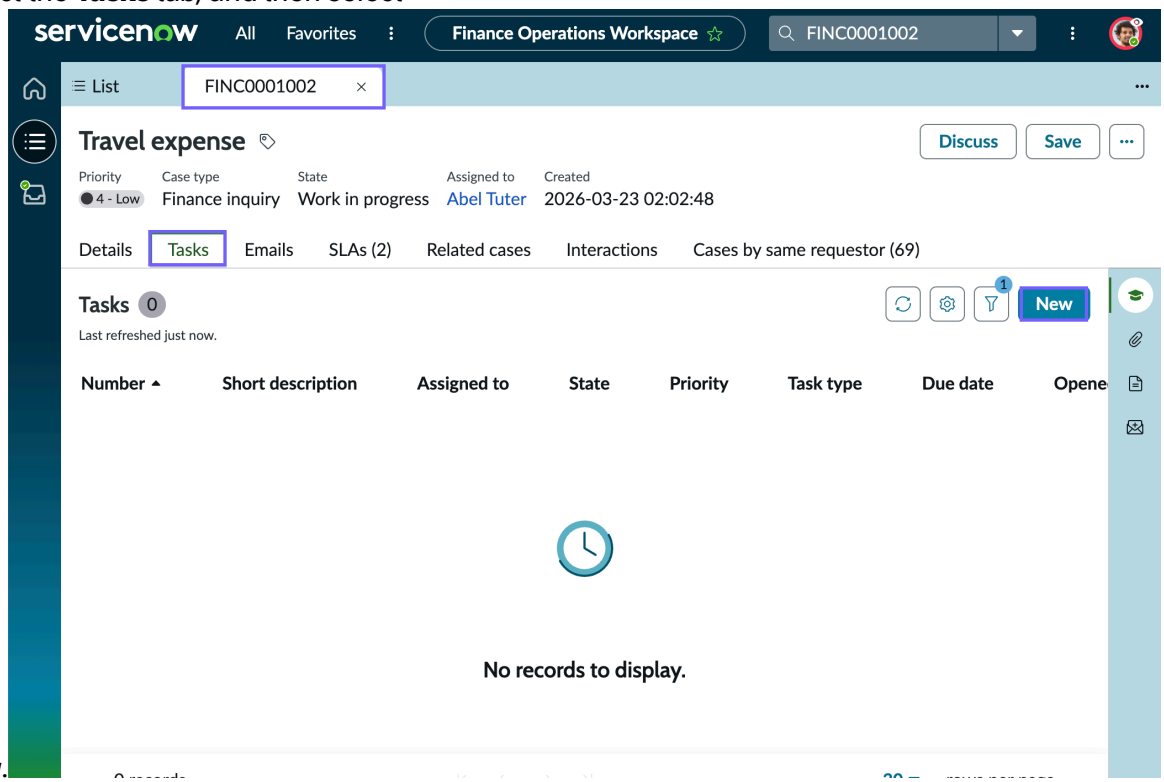
Role required: sn_fin_ops.specialist, sn-fin-ops.admin

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.

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2. In the Finance Operations workspace, select the List icon .
3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. From the Number column, select a link to open the finance inquiry case.
5. Select the **Tasks** tab, and then select **New**.



6. On the Create New Finance Task form, fill in the fields.
   For more information on the form fields and descriptions, see Create a finance task form.
7. Select **Save**.

Close a finance case

Close a finance case after all the activities and tasks for resolving the case are complete.

Before you begin

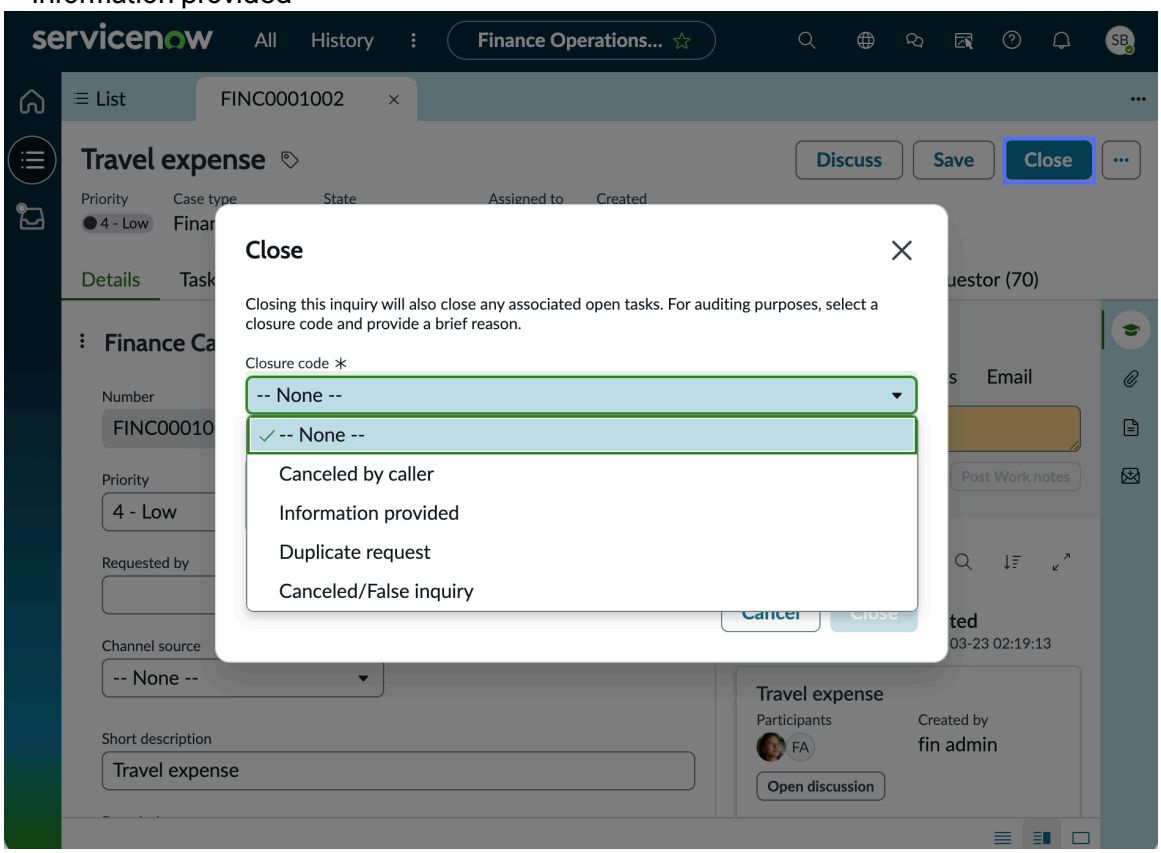
Role required: sn_fin_ops.specialist

Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon).

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3. From the list page, navigate to either of the following submodules:
   - **My work** > **Open cases**
   - **All work** > **Cases**
4. In the Number column, select the link to open the case.
5. Select **Close**.
   The Close dialog box is displayed.
6. From the **Closure code**, select one of the following options:
   - Duplicate request
   - Canceled/False inquiry
   - Canceled by caller
   - Information provided



7. In the **Closure notes** field, enter the reason for closing the case.
8. Select **Close**.

Result

The case moves to the Closed complete state, the associated open tasks are closed, and the details in the Closure section are filled.

Create a knowledge base article

Create knowledge base articles for finance-related topics.

Before you begin

Role required: sn_fin_ops.admin, sn_fin_ops.specialist

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Procedure

1. Navigate to either of the following:
   - **All** > **Finance Operations** > **Finance Operations Workspace**.
   - **Workspaces** > **Finance Operations Workspace**.
2. In the Finance Operations workspace, select the List icon 
3. From the list page, navigate to **Knowledge** > **Finance articles**.
4. Select **New**.

   Note: In the current version, the **New** button to create a knowledge base article from the Finance Operations Workspace is non-functional. For information on a workaround, see the knowledge base article KB2097952.

5. In the Create article dialog box, do the following:
   - From the **Knowledge Base** field, select **Finance Case Management Knowledge Base**
   - From the **Article Template** field, select **Standard**.
   - Select **Create Article.**
6. On the Create New Knowledge form, fill in the fields.
   For more information on the form fields and descriptions, see Create knowledge base article form.
7. Save the article.

What to do next

Publish the knowledge article. For information, see Publish a knowledge base article.

Finance Case Management Reference

Reference topics provide additional information about the lists and forms that you use in Finance Case Management.

Create a finance case form

Use the Create New Finance Case form to enter finance case details and provide resolution information.

Create New Finance Case form

Field	Description
Finance Case	
Number	System-generated unique identifier for the case.
State	Status of the case: • Draft • Work in Progress • Closed complete

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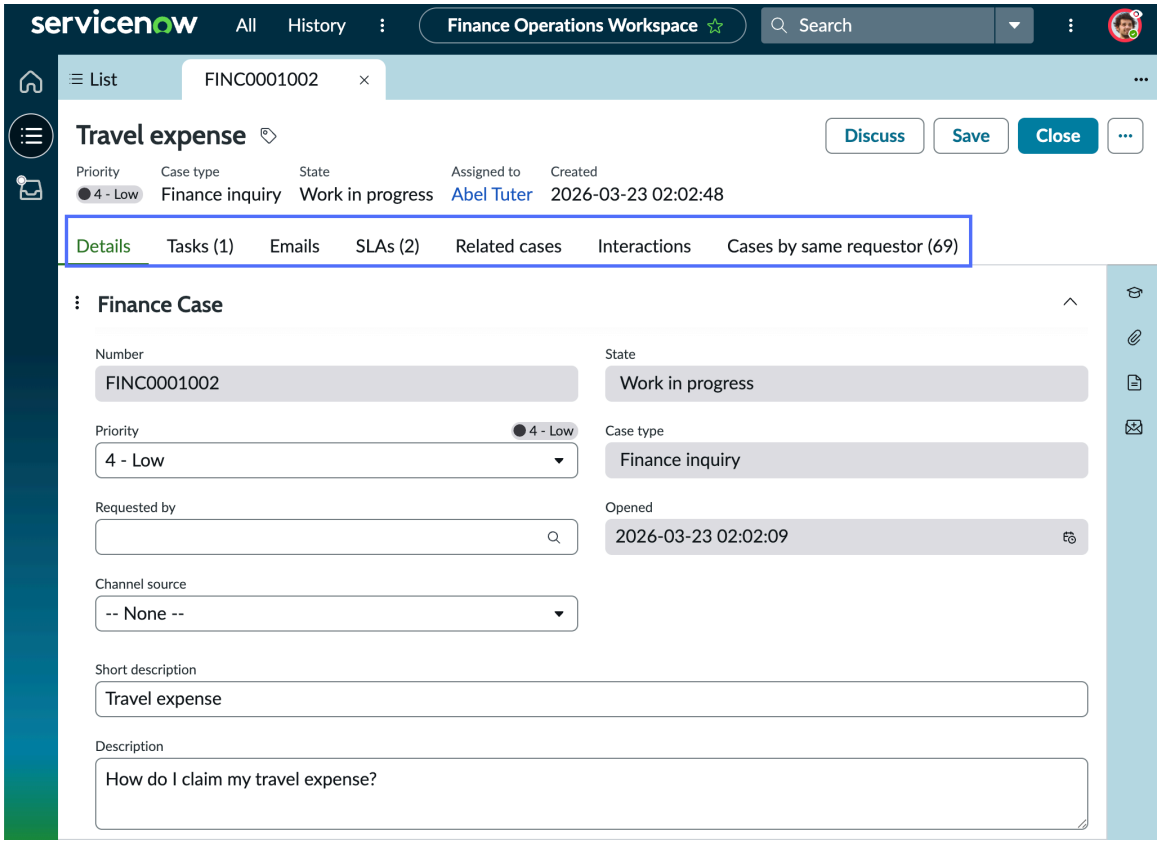
Create New Finance Case form (continued)

Field	Description
Priority	Urgency of case.
Case type	Type of case, such as Finance inquiry.
Requested by	Owner of the case.
Opened	Creation date of the case.
Channel source	Channel used to send the inquiry.
Short description	Brief description of the case.
Description	Detailed description of the case.
Assignment	
Assignment group	Group that can fulfill the case.
Assigned to	Person assigned to work on the case.
Watch list	Person who is notified about the status of the case.
Closure	
Closure code	Reason for closing the case.
Closed by	Person who closed the case.
Closed	Date and time of closing the case.
Closure notes	Details related to closing the case.

Finance Case form tabs

The Finance case form includes tabs that store finance case information that a finance specialist can use to perform related tasks.

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Finance case form tabs

Tab	Description
Details	Details about the case.
Tasks	Tasks that the finance specialist created for this case.
Emails	Emails sent or received while resolving this case.
SLAs	Service level agreements (SLAs) associated with the case. • For assigning finance cases, SLA is 4 hours duration, between 08:00 to 17:00 on weekdays, excluding holidays. • For processing finance cases, SLA is 16 hours duration between 08:00 to 17:00 on weekdays, excluding holidays. Finance admins can view and create SLAs by navigating to **All** > **Finance Operations** > **Administration** > **Finance case SLA Definitions**.
Related cases	Other cases related to this case.
Interactions	All interactions related to this case.
Cases by same requester	Cases that are opened by the same requester.

Create a finance task form

Use the Create New Finance task form to provide details about the finance task.

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Finance task form tabs

Tab	Description
Number	System-generated unique identifier for the task.
State	Status of the task: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Priority	Urgency of task.
Related case	Case associated with the task.
Assignment group	Group that you want to assign this task. You can assign the task to any group. Members who have the Finance roles can see and work on the task.
Assigned to	Person that you want to assign this task to. You can assign the task to any person. Persons who have the Finance roles can see and work on the task.
Short description	Brief description about the task.
Description	Detailed description about the task.

Interaction form

For an auto-generated interaction record, the **Details** tab contains details of the interaction.

Fields in the Details tab

Field	Description
Number	Auto-generated unique interaction number.
Opened for	Name of the user.
Type	Channel through which interaction is created. For example, chat.
Assigned to	Name of the assigned agent.
State	Status of the interaction
Application	Type of application. For example, Finance Case Management.
Short description	Brief description of the interaction.
Work notes	Additional notes about the interaction record.

Create new interaction related record form

Use the Create New Interaction Related Record form to provide details about the associated finance case.

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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.
Document table	Finance case name that you want to associate with the interaction record.
ID of related record	ID of a related record. This field is auto-populated after you select **Document table**.

Email notifications from Finance Case Management

Finance Case Management sends email notifications when you perform certain actions on a finance case.

Finance Case Management sends emails in a predefined template and uses email actions to trigger email conditions. You can use the deep links in the emails to view relevant details.

Email conditions and recipients

Email conditions	Recipients
A new finance case is created.	Email sender, case submitter, or requester
A new task is created for a finance case and assigned to a task owner.	Assigned task owner
A finance case is closed.	Requester
A comment is added to the finance case.	User addressed in the comment
A request for additional information is made.	Requester

Create knowledge base article form

Use the Create New Knowledge form to provide details about the knowledge base article.

Create knowledge base article form

Field	Description
Number	System-generated unique identifier for the knowledge base article.
Knowledge base	Knowledge base to which this article belongs, such as Finance Case Management Knowledge Base.
Category	Category of the article. Use the category picker to select an existing category or subcategory.
Scheduled publish date	Future date on which 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 whenever changes are made to a published article.
Article type	Type of article, such as HTML.

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Create knowledge base article form (continued)

Field	Description
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. Select this option to display attachments in the article.
Short description	Short description of the article.
Article body	Detailed description of the article.

ServiceNow Otto applications for Finance and Supply Chain

Use the ServiceNow® Use ServiceNow Otto for Finance and Procurement to help fulfillers and requesters quickly summarize cases, including procurement, supplier, and invoice records, keeping them informed of progress and next steps.

Get started

ServiceNow Otto for Finance and Procurement

ServiceNow Otto for Finance and Procurement	ServiceNow Otto for Sourcing and Procurement Operations (SPO)	ServiceNow Otto for Supplier Lifecycle Operations (SLO)
Learn about ServiceNow Otto for Finance and Procurement	Learn about ServiceNow Otto for Sourcing and Procurement Operations (SPO)	Learn about ServiceNow Otto for Supplier Lifecycle Operations (SLO)

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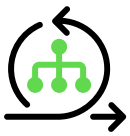
ServiceNow Otto for Finance and Procurement (continued)

ServiceNow Otto for Accounts Payable Operations (APO)  Learn about ServiceNow Otto for Accounts Payable Operations (APO)		

ServiceNow Otto for Finance and Procurement

Use ServiceNow Otto for Finance and Procurement to summarize purchase orders and keep fulfillers informed of their status, progress, and required actions.

Get started

Explore	Configure	Use
 Learn more about ServiceNow Otto for Finance and Procurement	 Configure ServiceNow Otto for Finance and Procurement to get started	 Use generative AI capabilities offered by ServiceNow Otto for Finance and Procurement

Important: 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. Please 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.

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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. Furthermore, 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. 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.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Explore ServiceNow Otto for Finance and Procurement

Use ServiceNow Otto for Finance and Procurement to summarize purchase orders and keep fulfillers informed of their status, progress, and required actions.

Overview of ServiceNow Otto for Finance and Procurement

With ServiceNow Otto for Finance and Procurement, fulfillers can leverage generative AI skills to generate concise summaries of purchase orders, enabling faster understanding and decision-making. These summaries provide visibility into completed actions, current status, and upcoming steps, empowering fulfillers to take timely and informed actions.

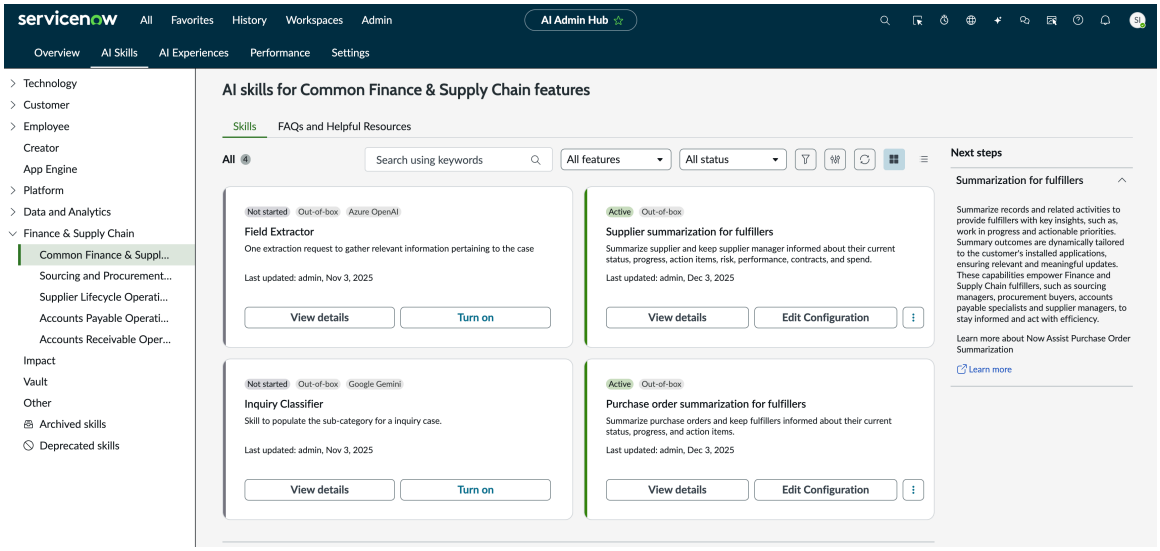
The summarization capability is available in the Source-to-Pay Workspace.

Note: You can install this application only if you're entitled to the Sourcing and Procurement Operations Pro Plus SKU or the Source-to-Pay Operations Pro Plus SKU.

AI skills for Common Finance and Supply Chain features

Purchase order summarization for fulfillers: Summarize purchase orders and keep fulfillers informed about their current status, progress, and action items.

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As a fulfiller (sn_fsc_genai.now_assist_fulfiller), you can use summarize purchase orders in the Source-to-Pay Workspace for the following products:

- Sourcing and Procurement Operations
- Supplier Lifecycle Operations
- Accounts Payable Operations

For more information on configuring ServiceNow Otto for Finance and Procurement, see Configuring ServiceNow Otto for Finance and Procurement.

To learn more about how to use ServiceNow Otto for Finance and Procurement, see Using ServiceNow Otto for Finance and Procurement

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Related topics

Explore ServiceNow Otto for Sourcing and Procurement Operations (SPO)

Explore ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Explore ServiceNow Otto for Accounts Payable Operations (APO)

Supporting information for ServiceNow Otto for Finance and Procurement

Get a quick overview of the important information that is related to the ServiceNow Otto for Sourcing and Procurement Operations (SPO) application.

Supported versions

ServiceNow Otto for Finance and Procurement is supported starting with Yokohama.

Supported user interfaces

The ServiceNow Otto for Finance and Procurement application includes the skills that are listed in the following table.

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Supported user interfaces

Interface	Skills
Source-to-Pay Workspace	Purchase order summarization for fulfillers

Required roles

To use ServiceNow Otto for Finance and Procurement, you need specific roles. For more information, see Roles for ServiceNow Otto for Finance and Procurement.

Licensing requirements

The ServiceNow Otto for Finance and Procurement application requires the Source-to-Pay Operations Pro Plus SKU.

Application information

The ServiceNow Otto for Finance and Procurement store app (sn_fsc_genai) includes the Purchase order summarization for fulfillers skill.

To use ServiceNow Otto for Finance and Procurement (sn_fsc_genai) with SPO, SLO, or APO, install the corresponding plugins as required:

- ServiceNow Otto for SPO (sn_spend_gen_ai).

  ServiceNow Otto for SLO (sn_supplier_gen_ai)

- ServiceNow Otto for APO (sn_ap_gen_ai)

For more information, see Configuring ServiceNow Otto for Finance and Procurement.

Related topics

ServiceNow Otto for Sourcing and Procurement Operations (SPO)

ServiceNow Otto for Supplier Lifecycle Operations (SLO)

ServiceNow Otto for Accounts Payable Operations (APO)

Roles for ServiceNow Otto for Finance and Procurement

Grant fulfiller, requester, and supplier user roles to access generative AI skills for ServiceNow Otto for Finance and Procurement.

Roles installed

Roles for ServiceNow Otto for Finance and Procurement

Role title [name]	Description	Contains roles
ServiceNow Otto for Finance and Procurement		
sn_fsc_genai.now_assist_fulfiller	Fulfiller role to access generative AI skills for FSC Common	now_assist_panel_user

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Roles for ServiceNow Otto for Finance and Procurement (continued)

Role title [name]	Description	Contains roles
sn_fsc_genai.now_assist_requester	Requester role to access generative AI skills for FSC Common	
sn_fsc_genai.now_assist_supplier	Supplier role to access generative AI skills for FSC Common.	
ServiceNow Otto for Accounts Payable Operations (APO)		
sn_ap_gen_ai.now_assist_fulfiller	Fulfiller role to access generative AI skills for Accounts Payable Operations.	sn_fsc_genai.now_assist_fulfiller
sn_ap_gen_ai.now_assist_supplier	Supplier role to access generative AI skills for Accounts Payable Operations.	sn_fsc_genai.now_assist_supplier
ServiceNow Otto for Sourcing and Procurement Operations (SPO)		
sn_spend_gen_ai.now_assist_fulfiller	Fulfiller role to access generative AI skills for Sourcing and Procurement Operations.	sn_fsc_genai.now_assist_fulfiller
sn_spend_gen_ai.now_assist_requester	Requester role to access generative AI skills for Sourcing and Procurement Operations.	sn_fsc_genai.now_assist_requester
ServiceNow Otto for Supplier Lifecycle Operations (SLO)		
sn_supplier_gen_ai.now_assist_fulfiller	Fulfiller role to access generative AI skills for Supplier	sn_fsc_genai.now_assist_fulfiller

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Roles for ServiceNow Otto for Finance and Procurement (continued)

Role title [name]	Description	Contains roles
	Lifecycle Operations.	
sn_supplier_gen_ai.now_assist_supplier	Fulfiller role to access generative AI skills for Supplier Collaboration Portal	sn_fsc_genai.now_assist_supplier

Related topics

- ServiceNow Otto for Sourcing and Procurement Operations (SPO)
- ServiceNow Otto for Supplier Lifecycle Operations (SLO)
- ServiceNow Otto for Accounts Payable Operations (APO)

Configuring ServiceNow Otto for Finance and Procurement

If you have the admin role, you can configure the ServiceNow Otto for Finance and Procurement application so that your fulfillers can use the agentic AI skills in Source-to-Pay Workspace Workspace and Core UI.

Before you begin

Role required: admin

About this task

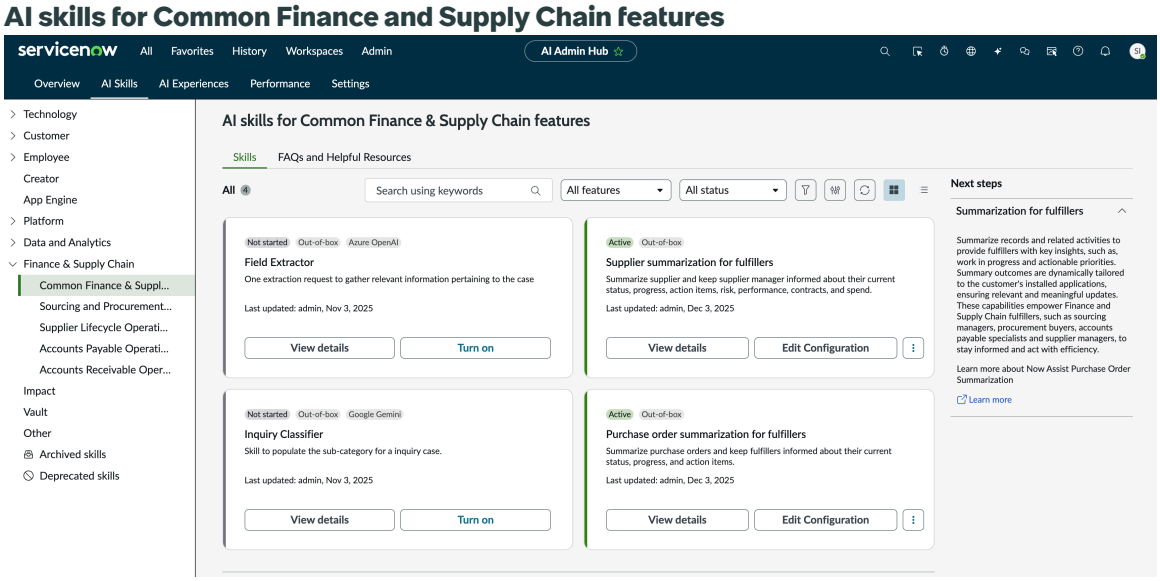
Use the AI Admin Hub to configure ServiceNow Otto for Finance and Procurement. This console contains everything that you need to install the plugins and configure the agentic AI skills. For additional information, see Overview tab in AI Admin Hub.

The following table lists the ServiceNow Otto for Finance and Procurement and skills that you can access from the AI Admin Hub.

ServiceNow Otto for Finance and Procurement features and skills in the AI Admin Hub

ServiceNow Otto for SPO skills	Description
Supplier summarization for fulfillers	Summarize supplier details and keep fulfillers informed about their overview, total spends, and performance.
Purchase order summarization for fulfillers	Summarize purchase orders and keep fulfillers informed on their status, progress, and required actions.

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Procedure

1. Install the ServiceNow Otto for Finance and Procurement (sn_fsc_genai) plugin.
   - For information about the plugin dependencies and plugin activation order, see Supporting information for ServiceNow Otto for Finance and Procurement.
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **AI Admin Hub** > **Skills**.
3. Select the **AI Skills** tab.
4. Expand the **Finance & Supply Chain** workflow group and select **Common Finance and Supply Chain features**.
5. Activate and configure the AI skills for Common Finance and Supply Chain features.

AI skills for Common Finance and Supply Chain skills

Skills	Action
Supplier summarization for fulfillers	Summarize supplier details and keep fulfillers informed about their overview, total spends, and performance.
Purchase order summarization for fulfillers	On the Purchase order summarization for fulfillers skill card, select **Activate skill** to activate the skill.

6. 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.
7. Follow the steps to configure and activate a skill using the Guided Setup.
8. 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.
9. **Optional:** Select **Customize and test prompt** to test the prompt on a record.
10. Select **Save and continue** to go to the next step in the Guided Setup.
11. **Optional:** Select **Define Availability** and choose one of the following options.

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Option	Description
Skill is always available	Skill is always available to users.
Customize skill availability	The skill is available only when the certain conditions are met (Default). (Optional) Use the condition builder to set your conditions.

12. Select **Save and continue** to go to the next step in the Guided Setup.
13. Choose **Select display** to determine where you'd like to display the skill.

Option	Description
In-product desktop	The Purchase order summarization for fulfiller skillis displayed in the Source-to-Pay Work space for Sourcing and Procurement Opera tions, Supplier Lifecycle Operations, and Ac counts Payable Operations.
ServiceNow Otto panel	AI skills are available in the ServiceNow Ot to panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more infor mation, see Configure multilingual service for **Note:** If you don't see this option, you must activate the ServiceNow Otto pan el. For more information, see Activate the ServiceNow Otto panel standard

14. Select **Save and continue** to go to the next step.
15. Review your choices and select **Activate** to complete the configuration for the skill.
16. Select **Return to Common Finance & Supply Chain features**.
    The skill is activated.

Related topics

Configure ServiceNow Otto for Sourcing and Procurement Operations (SPO)

Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure ServiceNow Otto for Accounts Payable Operations (APO)

Customize a generative AI skill

If you have the admin role, you can customize a ServiceNow Otto 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

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About this task

From the AI Admin Hub, 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** > **AI Admin Hub** > **Skills**.
2. Select the **AI Skills** tab.
3. In the **Finance and Supply Chain** workflow group, select **Common Finance and Supply Chain features** to view the AI skills for Common Finance and Supply Chain features.
4. Create a copy of a skill and customize the input fields.

   a. On the Purchase order summarization for fulfillers feature card, select the More actions icon (⋮).

   b. Select **Make a copy**.
   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.

5. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for ServiceNow Otto 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.

6. 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.

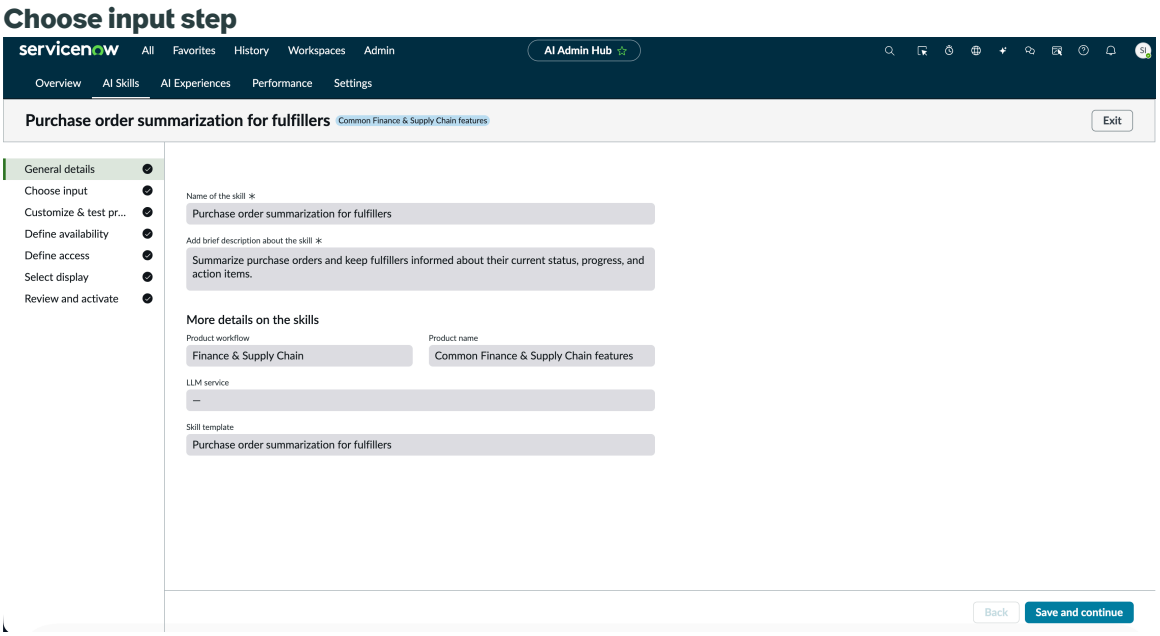
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   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 Purchase Order table whose value this skill uses in its response. For example, `Order type`.
Field description	Description of the base input field value. For example, `Type of the purchase order`.

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.

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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.

7. 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 for PO**
- **Actions completed for PO**
- **Next steps for PO**

The following table lists the mandatory prompt headers.

Mandatory prompt headers

Input template state	Mandatory prompt header
Open	▪ Overview for PO ▪ Actions completed for PO ▪ Next steps for PO
Closed	▪ Overview for PO ▪ Actions completed for PO

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.

8. Define how the skill is available to your users.

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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.

9. Configure where to display the record summarization.

a. Select either **In-product**, or *ServiceNow Otto* **panel**.

- **In-product desktop**: When selected, the customized Purchase order summarization for fulfillers skill is shown on the forms and workspaces in all Common Finance & Supply Chain features products.

  For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

- *ServiceNow Otto* **panel**: When selected, the AI skills are available in the ServiceNow Otto panel.

  AI skills are available in the ServiceNow Otto panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more information, see Configure multilingual service for ServiceNow Otto applications.

  Note: If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat.

  For the skills that appear in the ServiceNow Otto 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.

10. Review and activate the skill.
Review your choices and select **Activate** to complete the skill customization.
The fulfillers having the sn_fsc_genai.now_assist_fulfiller role can now select **Summarize** for a purchase order record in the Source-to-Pay Workspace to generate the summary for the purchase order.

Skill inputs for ServiceNow Otto for Finance and Procurement

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.

AI skills for AI skills for Common Finance and Supply Chain features

The ServiceNow Otto for Finance and Procurement includes the Purchase order summarization for fulfillers skill.

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Purchase order summarization for fulfillers skill

Inputs for the Purchase order summarization for fulfillers skill identify the table and fields used when the summary is generated for a purchase order.

The following table lists the inputs for the Purchase order summarization for fulfillers skill from the Choose input for purchase order page in the AI Admin Hub.

Purchase order summarization for fulfillers skill input

Input	Description
Base input table	Purchase Order [sn_shop_purchase_order] table.
Base input fields	• Number • Business owner • Order type • Supplier • Total amount • Status • Order placed • Cancellation reason • Order paid • ERP number • Activity

Customize supplier summarization for fulfillers skill

If you have the admin role, you can customize the supplier summarization for fulfillers skill so that fulfillers can use the generative AI skills in Source-to-Pay Workspace to view relevant supplier information.

Before you begin

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: admin

About this task

From the AI Admin Hub, 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** > **AI Admin Hub** > **Skills**.
2. Select the **AI Skills** tab.

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3. In the **Finance and Supply Chain** workflow group, select **Common Finance and Supply Chain features** to view the AI skills for Common Finance and Supply Chain features.
4. Create a copy of a skill and customize the input fields.

   a. On the Supplier summarization for fulfillers feature card, select the More actions icon (⋮).

   b. Select **Make a copy**.
   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.

5. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for Supplier summarization for fulfillers skill.

   a. Enter a name and description for the skill.

   b. Select **Save and continue** to go to the next step.
6. View the input data for each skill, such as the base input fields and related lists for the different input templates.

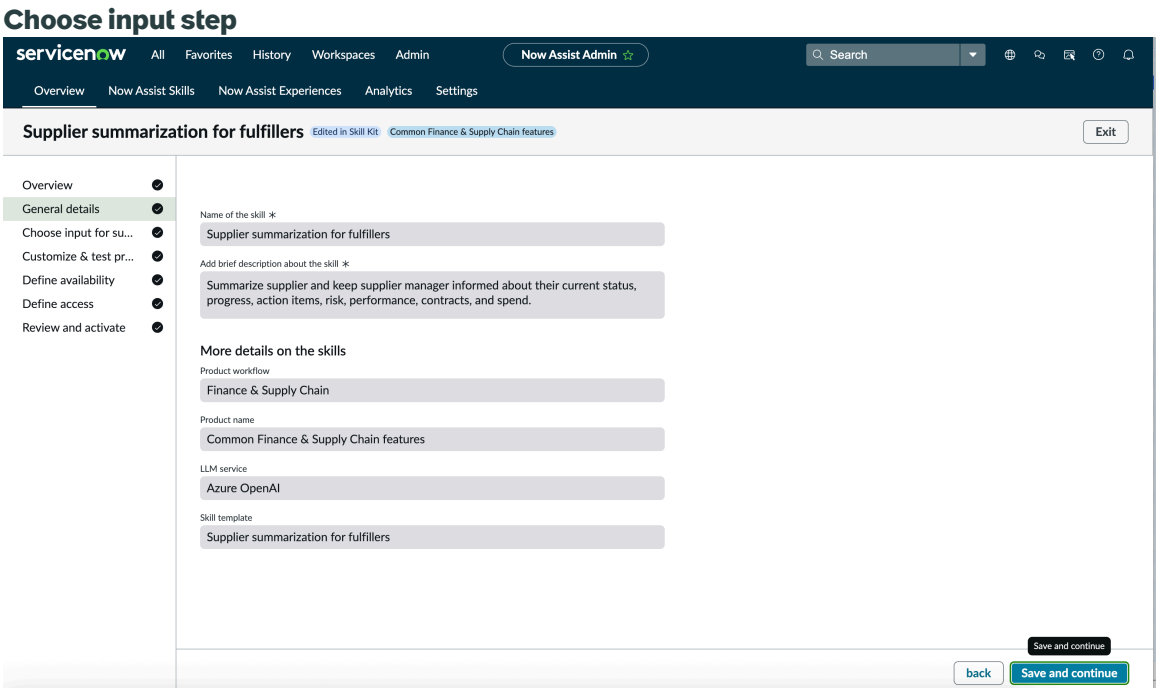
   Configure the base input table fields and related lists for the different input templates for the skill.

   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 Supplier table whose value this skill uses in its response. For example, `Legal name`.
Field description	Description of the base input field value. For example, `Legal name of the supplier`.

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.

7. Customize prompt output.

Select **Active** and **Save and continue**.

The following prompt sections will be displayed while using the skill:

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- **Key Supplier Details**
- **Procurement Specialist specific details**
- **AP specialist specific details**
- **Supplier Manager specific details**

8. 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.

9. Define who can access this skill.

   a. Edit the Access control lists (ACLs) to determine who has access to this skill (optional).

   b. Select **Save and continue** to go to the next step.

10. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    The fulfillers having the sn_fsc_genai.now_assist_fulfiller role can now select **Summarize** for a supplier record in the Source-to-Pay Workspace to generate the summary of the supplier.

Skill inputs for Supplier summarization for fulfillers skill

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.

AI skills for Common Finance and Supply Chain features

The ServiceNow Otto for Finance and Procurement includes the Supplier summarization for fulfillers skill.

Supplier summarization for fulfillers skill

Inputs for the Supplier summarization for fulfillers skill identify the table and fields used when the summary is generated for a supplier.

The following table lists the inputs for the Supplier summarization for fulfillers skill from the Choose input for suppliers in the AI Admin Hub.

Supplier summarization for fulfillers skill input

Input	Description
Base input table	Supplier [sn_fin_supplier] table

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Supplier summarization for fulfillers skill input (continued)

Input	Description
Base input fields	• Legal name • Onboarded • Status • On-boarded date • DUNS number

Plugins for AI capabilities in Finance and Supply Chain

View the consolidated list of plugins required to use the common AI capabilities across Finance and Supply Chain products.

Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Application plugin list

Bundle	Application	Plugin dependencies
Foundation	Finance and Procurement - Foundation (sn_ai_fsc_fdn)	• ServiceNow Otto for Platform Foundation (sn_ai_plat_fdn) • ServiceNow Otto for Finance and Procurement (sn_fsc_genai)
Prime	Finance and Procurement - Prime (sn_ai_fsc_prime)	• ServiceNow Otto for Platform Prime (sn_ai_plat_prm) • Finance and Procurement - Foundation (sn_ai_fsc_fdn)
	ServiceNow Otto for Finance and Procurement (sn_fsc_genai)	• ServiceNow Otto for Platform (sn_genai_platform) • Universal Request for Source-to-Pay Operations (sn_fsc_ur_common)

Using ServiceNow Otto for Finance and Procurement

As a fulfiller, you can use the AI skills for FSC Common to quickly summarize purchase orders in the S2P workspace using the Purchase order summarization for fulfillers skill.

What ServiceNow Otto for Finance and Procurement can do for you

ServiceNow Otto for Finance and Procurement works with your purchase order and related procurement data to:

Summarize purchase orders

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Get a quick overview of a purchase order's status, completed actions, and next steps by using the Purchase order summarization for fulfillers skill. If the purchase order has associated email records, the summary's next steps also factor in relevant email context, such as the sender, date, and key message.

For information on how to summarize a purchase order, see Summarize a procurement case.

Summarize a procurement case

Use the Procurement case summarization for fulfillers skill to summarize procurement cases. Summaries include status, progress, and required actions to keep fulfillers informed.

Before you begin

Role required: sn_fsc_genai.now_assist_fulfiller

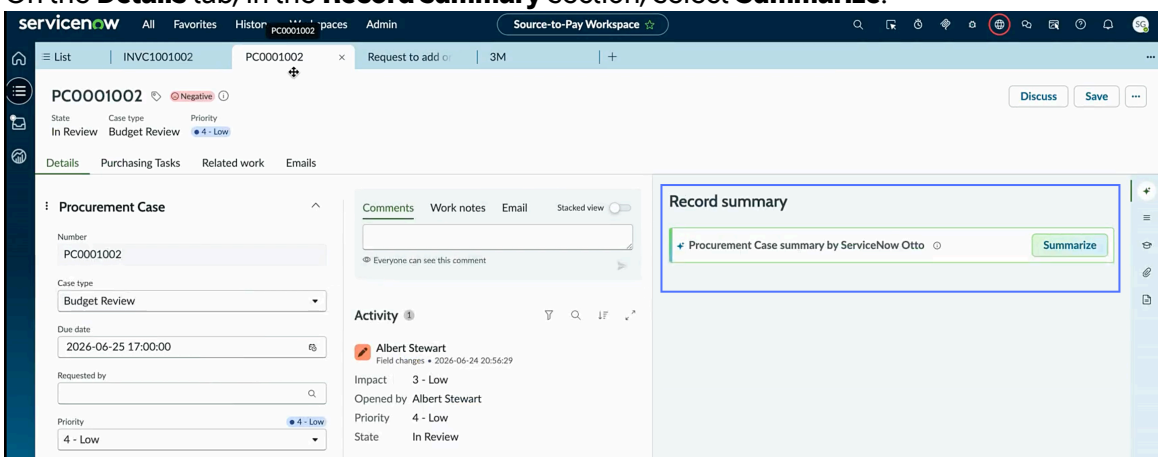
About this task

this record 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 ( ).
3. Navigate to **Lists** > **My work** > **Open cases**.
4. Select the procurement case number in the **Number** column.
5. On the **Details** tab, in the **Record summary** section, select **Summarize**.

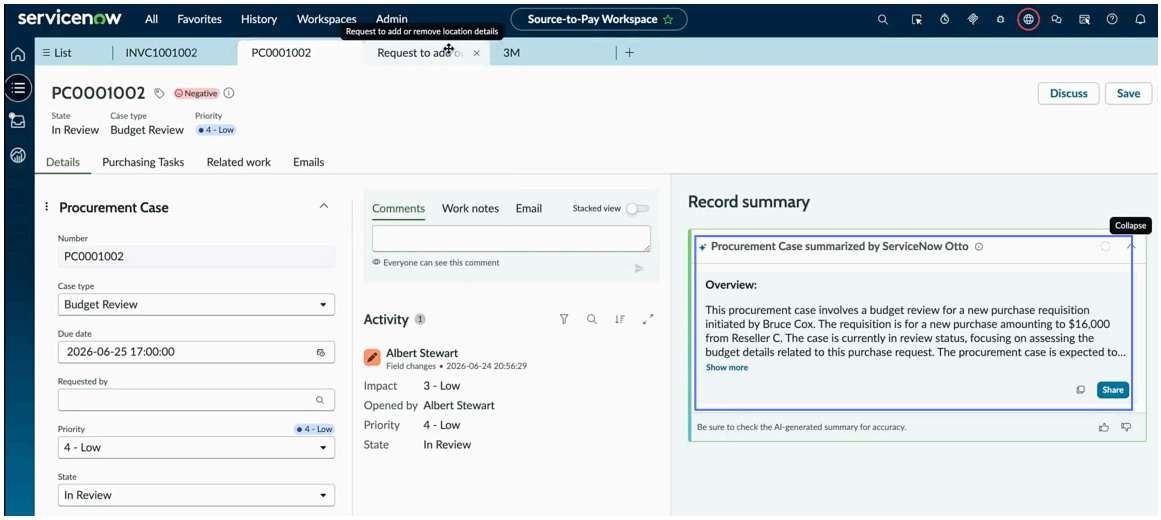


The following message appears: ServiceNow Otto is summarizing your procurement case.

Note: Generating and displaying the summary may take several seconds.

6. Review the summary details.

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- **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. If the record has associated email records, this also factors in relevant email context, such as the sender, date, and key message.

7. **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.

Option	Procedure
Save the summary information by adding it to the record work notes	**a.** Select **Share**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the col lapse card icon ( ) to show more or fewer summary details.
Provide feedback for the summary	If the summary was helpful, select the helpful icon ( ). If the summary wasn't helpful, se lect the not helpful icon ( ). This feedback improves the generative AI model and may improve future versions of this skill.
Copy the record summary	Select the copy to clipboard icon ( ) to use the summary in another location, such as an email.
View the information about the record sum mary	If you want to check some details about the summary, select the more info icon ( ).
Refresh the record summary	If you want to refresh the summary, select the refresh icon ( ).

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Related topics

- Use ServiceNow Otto for Sourcing and Procurement Operations (SPO)
- Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)
- Use ServiceNow Otto for Accounts Payable Operations (APO)

Categorize inquiry cases

Categorize incoming inquiry cases into sub-categories based on the description and short description of the invoice inquiry case using the Inquiry Classifier skill in the Now Assist for Common Finance and Supply Chain features application.

Before you begin

Role required: sn_fsc_genai.now_assist_fulfiller

Incoming invoice inquiry case.

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Create an invoice inquiry case.
   For more information on inquiry case, see Work on an invoice inquiry case. The Inquiry Classifier AI skill analyzes the description and short description, auto-categorizes the incoming inquiries into sub-categories. Example: Payment inquiry

Result

The invoice inquiry case is auto-populated with sub-category without any manual intervention by an AP agent.

AI Data Explorer using multiple tables

The AI Data Explorer interprets natural-language prompts to correlate data across multiple related Accounts Payable Operations, Sourcing and Procurement Operations, and Supplier Lifecycle Operations tables. Fulfillers get unified answers without manually exporting and joining data.

Key benefits

Multi-table analysis with AI Data Explorer provides the following benefits:

- Correlates data across related entities, such as supplier, invoice, and purchase order, in a single query.
- Reduces the manual effort.
- Supports faster, more complete decision-making from a single prompt-based interaction.

How it works

A fulfiller enters a natural-language prompt describing the information they need. AI Data Explorer interprets the prompt, queries the relevant APO, SPO and SLO tables, and returns a consolidated answer.

- Queries can span multiple related tables, including invoice, supplier, approval, purchase order, and receipt data.
- Answers combine data from more than one table into a single result set.

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Using AI Data Explorer in Source-to-Pay Operations

Use the AI Data Explorer in Source-to-Pay Operations to generate reports, visualizations, and data insights from APO, SPO and SLO workspace using natural language questions.

Before you begin

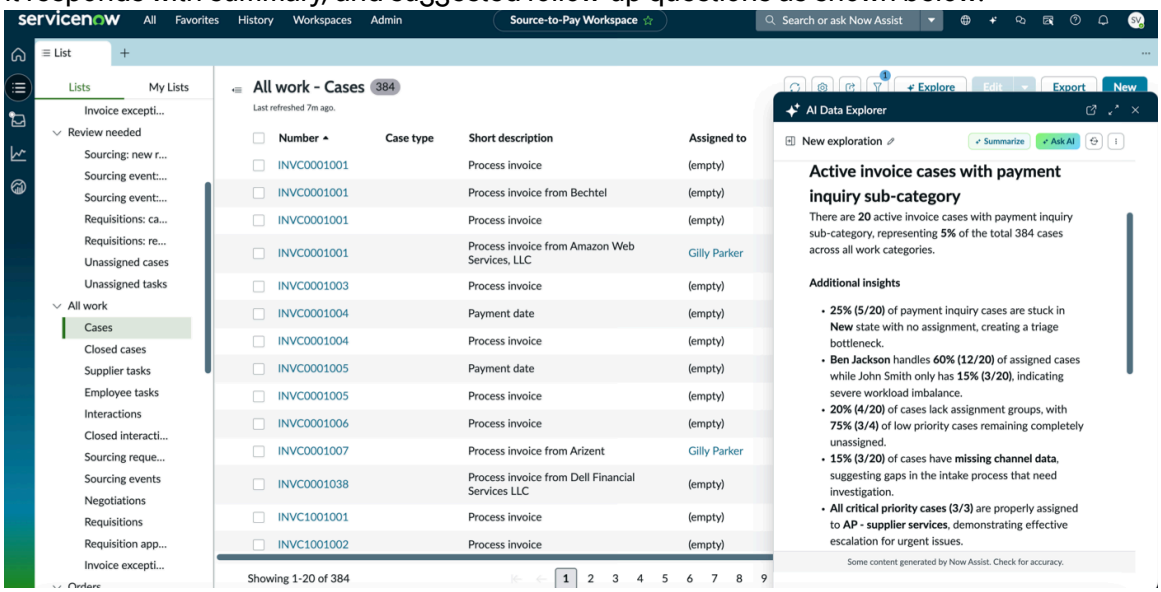
Role required: now_assist_explorer_user

About this task

The AI Data Explorer enables fulfillers and requesters to generate reports, visualizations, and data insights through a conversational interface from Source-to-Pay workspace using natural language. Users input natural language prompts to query data without needing technical expertise in tables, filters, or data structures.

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed. The List page displays **Explore with AI** option. As a fulfiller or a requester you can explore data insights through conversational analytics. You can ask specific questions in AI Data Explorer, to which it responds with summary, and suggested follow-up questions as shown below:



   For more information on the extended data analysis, data visualization in AI data explorer, see Use AI to explore data with AI Data Explorer .
   The AI-assisted, interactive exploration assists fulfillers in making data-driven decisions within the Source-to-Pay workspace.

Query multiple tables in AI Data Explorer

Use natural-language prompts to retrieve and correlate data from multiple related tables in a single answer.

Before you begin

Role required: fulfiller

About this task

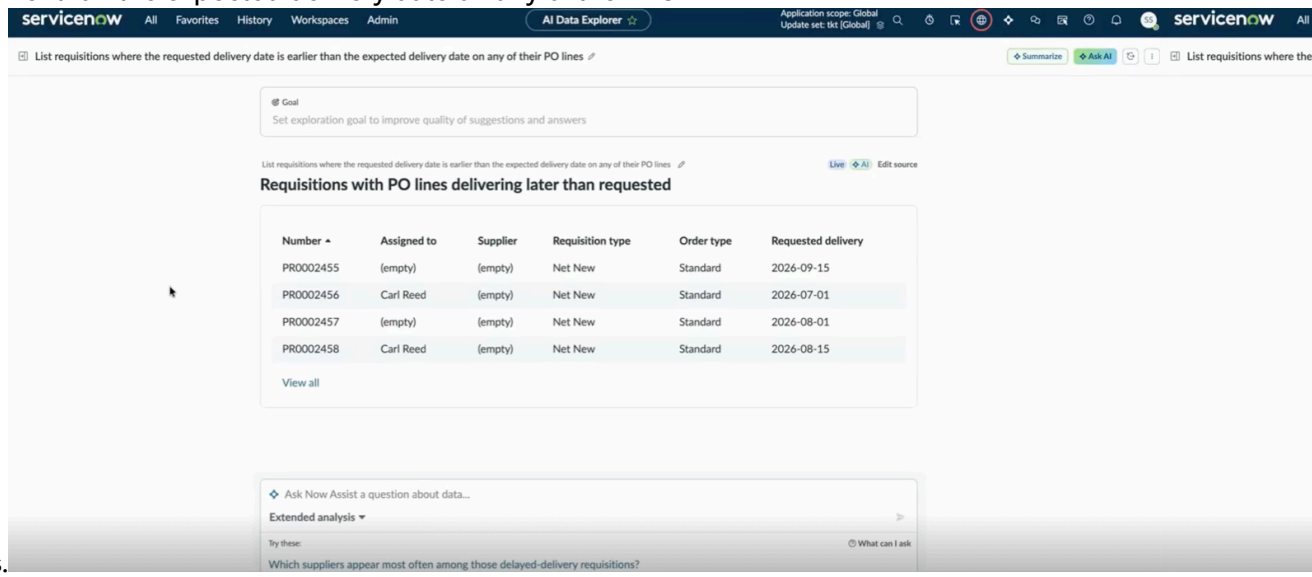
Use this procedure when you need to combine data from multiple related tables, such as invoices, suppliers, purchase orders, and approvals.

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> **⚠ Warning:**
>
> Generative AI may produce inaccurate or incomplete information. Always validate AI-generated content and implement human review of results.

Procedure

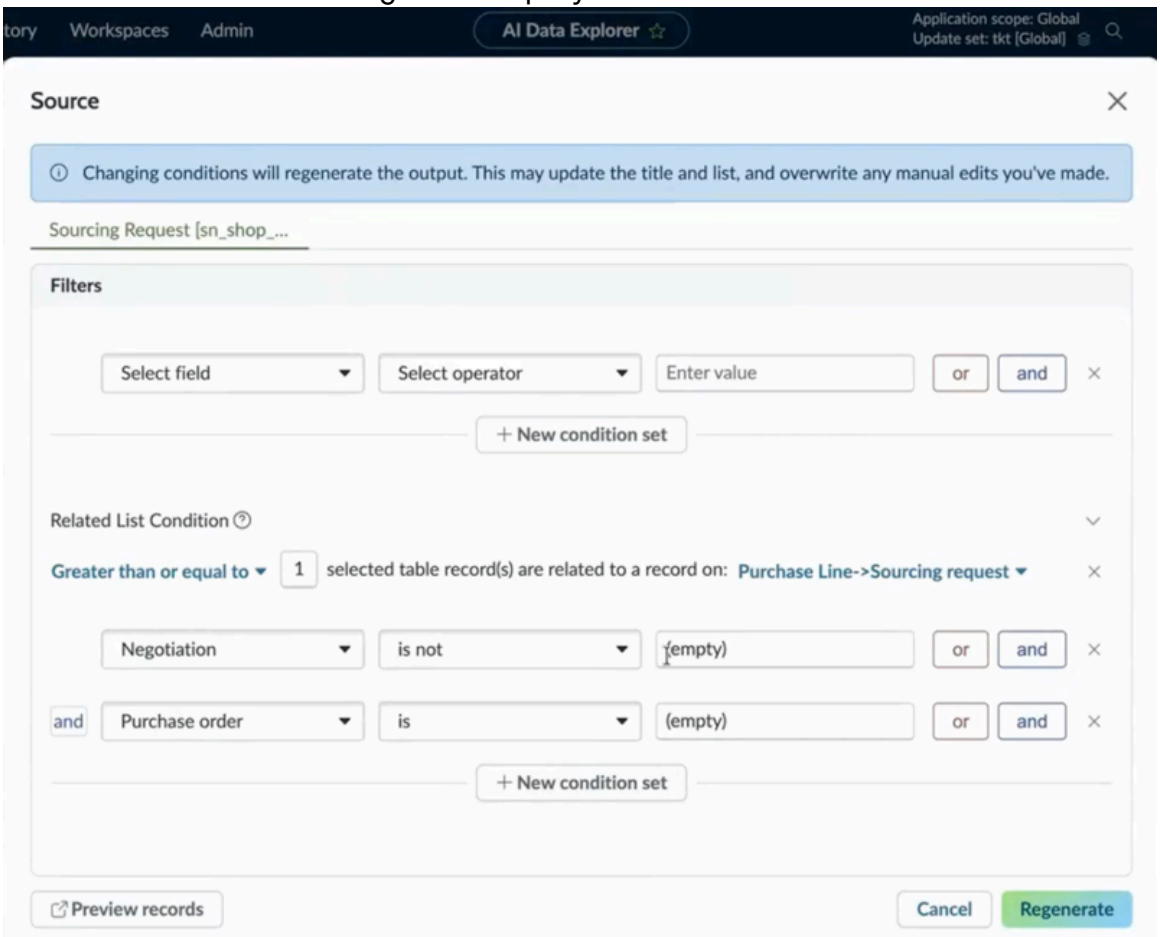
1. Navigate to **AI Data Explorer**.
2. In the prompt field, enter your question in natural language.
   Example: List requisitions where the requested delivery date is earlier than the expected delivery date on any of their PO lines.



   The interface displays the generated query and results from the relevant tables.

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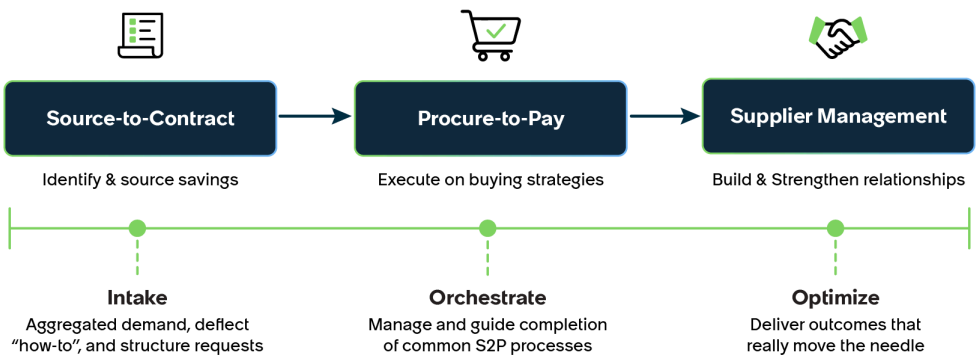
3. Select **Edit source** to view the generated query.



Result
AI Data Explorer interprets your prompt and returns a consolidated answer that combines data from the relevant related tables.

Source-to-Pay Operations

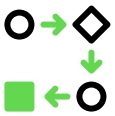
Source-to-Pay Operations enables you to create sourcing requests, onboard suppliers, and manage invoices and payments in one streamlined workflow. Collaborate across teams, automate tasks, and use playbooks to avoid delays in approvals, onboarding, and completing requests. Maintain accurate supplier data, fulfill and manage purchase orders, and resolve invoice exceptions, ensuring timely payments from sourcing to fulfillment.



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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.



Gain visibility and control across sourcing and procurement processes

The Sourcing and Procurement Operations application helps teams streamline purchasing workflows, accelerate approvals, and improve transparency in order and supplier-related processes. It also supports automation to reduce delays and manual work. For more information, see Sourcing and Procurement Operations.



Streamline supplier onboarding and performance tracking

The Supplier Lifecycle Operations application manages supplier information, performance, and onboarding in a centralized workspace. It enables collaboration with suppliers and increases accountability across the lifecycle. For more information, see Supplier Lifecycle Operations.



Automate invoice processing and approvals

The Accounts Payable Operations application reduces the manual effort of handling invoices. It enables digital invoice submission, matching, exception handling, and approval tracking to help teams process payments efficiently. For more information, see Accounts Payable Operations.



Integrate seamlessly with third-party systems

Source-to-Pay Operations supports integration with external ERP systems such as SAP ECC and SAP S4 HANA. It enables end-to-end data exchange for purchase orders, receipts, invoices, and more. Additionally, it supports integration with 3CLogic to enhance user experience through voice and SMS channels. For more information, see Source-to-Pay Integrations.

Application availability in Source-to-Pay Operations

The following table shows the applications available with Source-to-Pay Operations Standard and Source-to-Pay Operations Professional.

Application	Source-to-Pay Operations Standard	Source-to-Pay Operations Professional
Procurement Case Management	✓	✓
Invoice Case Management	✓	✓

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Application	Source-to-Pay Operations Standard	Source-to-Pay Operations Professional
Supplier Case Management	✓	✓
Supplier Collaboration Portal	✓	✓
ERP Integration Framework	-	✓
Platform Analytics Advanced	-	✓
Virtual Agent	-	✓
Source-to-Pay Common Architecture	-	✓
Sourcing and Purchasing Automation	-	✓
Spend and Savings Management	-	✓
Sourcing Pipeline Management	-	✓
Supplier Operations	-	✓
Supplier Payment Optimization	-	✓
Supplier Relationship and Performance Management	-	✓
Accounts Payable Invoice Processing	-	✓

Note: These are the specific applications contained within each product description. However, additional dependent applications may be included with the Standard and Pro versions that are not explicitly mentioned.

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.

Get started

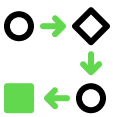
Source-to-Pay Operations purchasing and sourcing workflows

End-to-end purchasing workflow in Source-to-Pay Operations



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

End-to-end sourcing workflow in Source-to-Pay Operations



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

End-to-end sourcing and supplier onboarding workflow in Source-to-Pay Operations



Learn about the streamlined process for sourcing products and

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		onboarding suppliers to fulfill requests

End-to-end purchasing workflow in Source-to-Pay Operations

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.

The purchasing workflow is triggered when an active contractual price is available for a product or service the shopper intends to purchase.

Prerequisites

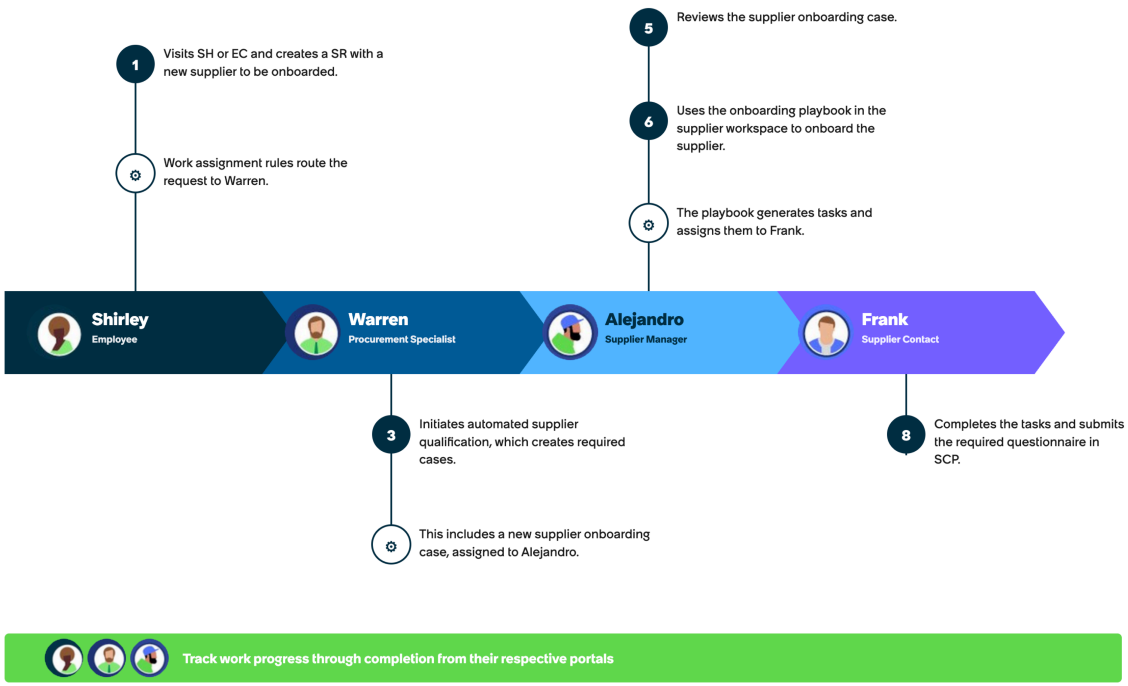
Install and activate the necessary plugins. For information on the respective product plugins and installation sequence, see:

- SPO: Install Sourcing and Procurement Operations
- 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:

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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.

   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.

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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.

End-to-end sourcing workflow in Source-to-Pay Operations

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.

The sourcing workflow is triggered when there is an active contractual price for a product or service that the shopper intends to purchase.

Prerequisites

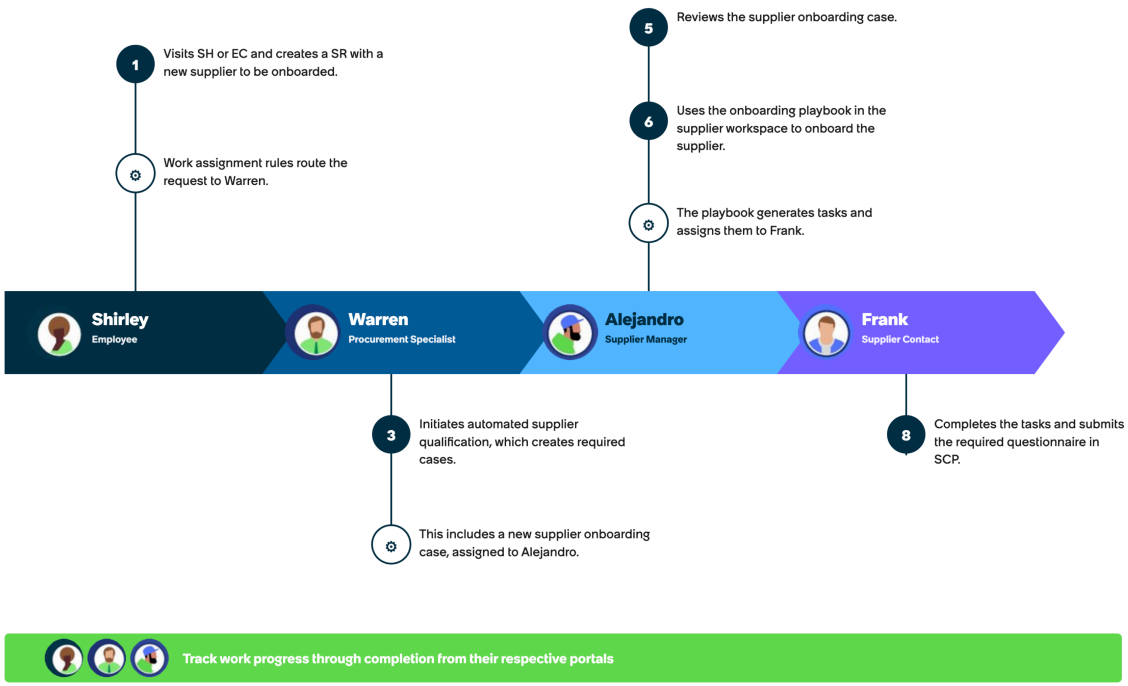
Install and activate the necessary plugins. For more information on the respective product plugins and installation sequence, see:

- SPO: Install Sourcing and Procurement Operations
- SLO: Application plugin installation sequence in Supplier Case Management
- 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.

Workflow of the sourcing process



In this workflow:

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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.

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 sourcing 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 End-to-end sourcing and supplier onboarding workflow in Source-to-Pay Operations.

   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 Use 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.

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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.

    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 sourcing 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.

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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.

    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.

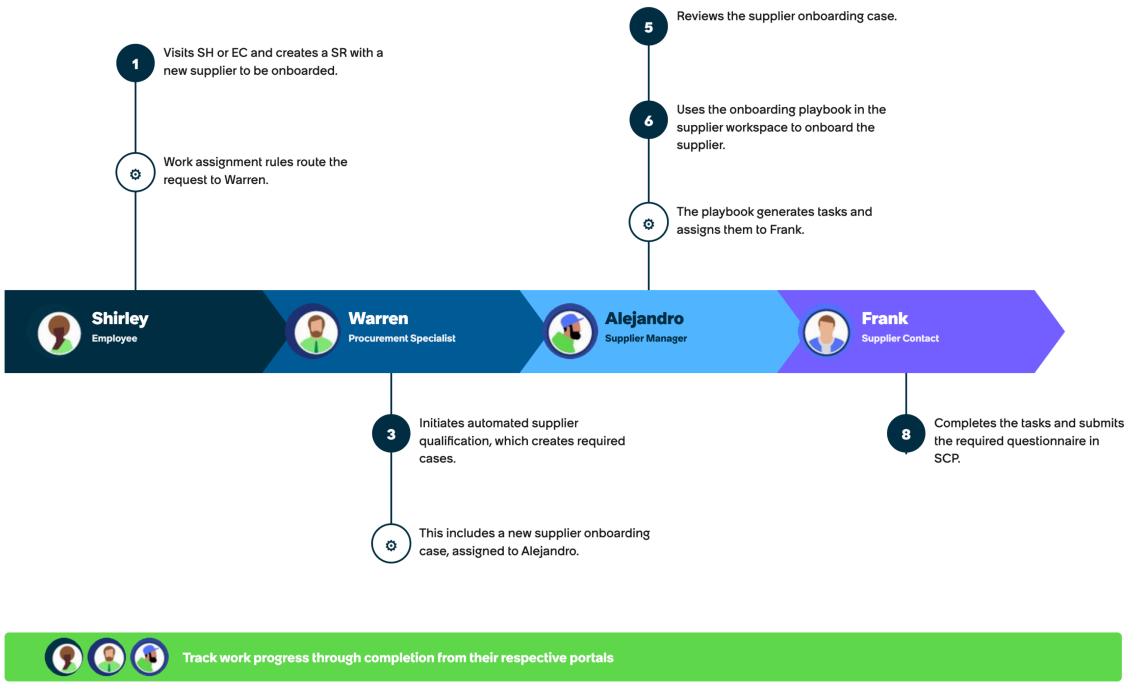
End-to-end sourcing and supplier onboarding workflow in Source-to-Pay Operations

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.

How sourcing and supplier onboarding works

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 for sourcing and supplier onboarding



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.

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4. The supplier manager reviews the supplier onboarding case and uses the onboarding playbook in the supplier workspace to onboard suppliers.
5. The playbook generates tasks and assigns them to the supplier being onboarded.
6. The supplier contact views the assigned tasks in the Supplier Collaboration Portal.
7. The supplier contact completes the assigned tasks and submits the required questionnaire in the Supplier Collaboration Portal.
8. The supplier manager reviews the collected supplier data and completes the onboarding playbook in the supplier workspace.
9. The employee, procurement specialist, and supplier manager have complete visibility into the status of work, including supplier onboarding, through process completion, from their respective portals.

Requirements for sourcing with a new supplier

Install and activate these plugins.

- Shopping Hub [com.snc.sn_spend_uib]
- Sourcing and Purchasing Automation [com.snc.sn_pr]
- Procurement Case Management [com.sn_spend_psd]
- Source-to-Pay Workspace [com.sn_spend_workspace]
- Playbooks for Sourcing and Procurement Operations [com.sn_spend_cp]
- Advanced Work Assignment for Sourcing and Procurement Operations [com.snc.sn_spend_awa]
- Supplier Common Architecture [com.snc.sn_slm]
- Supplier Lifecycle Operations [com.snc.sn_supplier_mgmt]
- Supplier Collaboration Portal [com.snc.sn_supplier_sp]
- Advanced Work Assignment for Supplier Lifecycle Operations [com.snc.sn_slm_awa]
- Source-to-Pay Common Architecture [com.snc.sn_shop]
- Finance Common Architecture [com.sn_fin]
- Common Service Delivery [com.sn_spend_sdc]
- Risk Assessments Integration for Sourcing and Procurement Operations [com.sn_spend_vrm]

For more information on installation, see Install Sourcing and Procurement Operations.

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.

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3. Begin the qualification process to onboard the new supplier. For more information, see Supplier qualification.

   Role: sn_shop.procurement_specialist.

4. Review the supplier onboarding case and start the supplier onboarding using playbooks. For more information, see Use 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.

ServiceNow Otto for Source-to-Pay Operations

Use the ServiceNow® ServiceNow Otto for Source-to-Pay Operations to help fulfillers and requesters quickly summarize cases, including procurement, supplier, and invoice records, keeping them informed of progress and next steps.

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Get started

ServiceNow Otto for Source-to-Pay Operations

ServiceNow Otto for Sourcing and Procurement Operations (SPO)	ServiceNow Otto for Supplier Lifecycle Operations (SLO)	ServiceNow Otto for Accounts Payable Operations (APO)
Learn about ServiceNow Otto for Sourcing and Procurement Operations (SPO)	Learn about ServiceNow Otto for Supplier Lifecycle Operations (SLO)	Learn about ServiceNow Otto for Accounts Payable Operations (APO)

Source-to-Pay Operations skills

Now Assist skills support Source-to-Pay workflows (APO, SPO and SLO) with AI-powered email generation, sentiment analysis for case prioritization, and natural language data exploration and reporting.

Note: The common Now Assist skills are applicable to Sourcing and Procurement Operations, Supplier Lifecycle Operations and Accounts Payable Operations.

The common Now Assist skills available in the Source-to-Pay Workspace are:

- Email response generation-This skill uses generative AI to automatically draft professional, context-aware email responses for supplier inquiries, procurement communications, and AP case management across Source-to-Pay workflows, reducing manual effort and improving response consistency. Email generation for Source-to-Pay workflows are available as:
  - Generate an email response for procurement cases in Sourcing and Procurement Operations
  - Generate an email response for supplier cases in Supplier Lifecycle Operations
  - Generate an email response for supplier tasks in Supplier Lifecycle Operations
  - Generate email response for invoice case in Accounts Payable Operations
  - Generate email response for invoice task in Accounts Payable Operations
- Sentiment analysis-The skill uses large language models to detect emotional tone (Positive, Negative, or Neutral) in cases across Source-to-Pay workflows. Sentiment analysis for Source-to-Pay workflows are available as:
  - Analyze sentiment in procurement cases
  - Analyze sentiments in supplier cases
  - Analyze sentiments in invoice cases
- AI Data Explorer-The AI Data Explorer for Source-to-Pay supports AI-driven prompt understanding, recommended queries, and drill-down capabilities within a unified interface. It enables business users to generate reports, visualizations, and KPIs using natural language queries without relying on technical expertise or predefined dashboards. Through a

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conversational interface, users can ask questions in plain English and receive interactive charts and summaries in real time. Explore AI is integrated within the Source-to-Pay tables and use cases, ensuring accurate, context-aware insights across procurement, supplier and accounts payable workflows. For more information on the data explorer, see Use AI to explore data with AI Data Explorer and Using AI Data Explorer in Source-to-Pay Operations.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Source-to-Pay Workspace

The Source-to-Pay Workspace provides experiences and tools that you can use to work on various activities, such as procuring goods, onboarding high-performing suppliers, and processing invoices.

The Source-to-Pay Operations (S2P) product suite includes the following products:

Source-to-Pay Workspace

Sourcing and Procurement Operations landing page  Learn about the Sourcing and Procurement Operations landing page	**Supplier Lifecycle Operations landing page**  Learn about the Supplier Lifecycle Operations landing page
Accounts Payable Operations landing page  Learn about the Accounts Payable Operations landing page	**Purchase Order Management landing page**  Learn about the Purchase Order Management landing page

Use the Source-to-Pay Workspace to manage all aspects and activities of Source-to-Pay Operations, whether you have installed the entire S2P product suite or individual products. Access to the landing pages and list views within the workspace is role-based.

The Source-to-Pay Workspace application provides experiences and tools for Procurement Specialists, Supplier Managers, Accounts Payable Specialists, and Operational Buyers. Use it to work on cases and tasks related to Source-to-Pay Operations.

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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 want to install just the Source-to-Pay Workspace application, the dependent application Procurement Case Management is also installed along with.

End user and roles

End user and goal	Required role
Procurement Specialist: View your open requests and purchasing to-dos.	sn_shop.procurement_specialist
PCM Agent: View your open requests and purchasing to-dos.	sn_spend_psd.agent
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 • View assigned cases and tasks, or tasks that are created by them • Update assigned cases and tasks, or tasks that are created by them	sn_slm.fulfiller
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

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End user and goal	Required role
Operational Buyer: View, track, and resolve purchase order exceptions	sn_poem_core.operational_buyer

Explore Source-to-Pay Operations 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

Let's consider a scenario where:

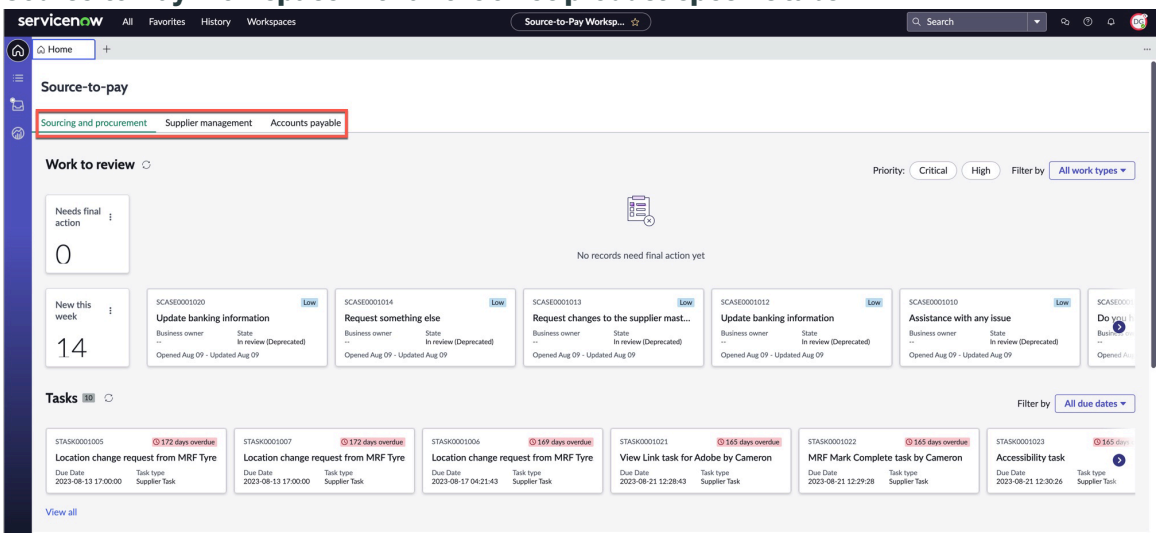
- You have installed Sourcing and Procurement Operations, Supplier Lifecycle Operations, and Accounts Payable Operations.
- You have been assigned the Procurement Case Management (PCM) agent [sn_spend_psd.agent], Supplier Fulfiller [sn_slm.fulfiller], and Accounts Payable Specialist [sn_ap_apm_accounts_payable_specialist] 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.

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- **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.

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.

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Components of a procurement report

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 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

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Components of a procurement report (continued)

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

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Components of a procurement report (continued)

Title	Type	Description
Knowledge articles	Widget	Open a new tab with the Purchase and Expense category knowledge base page.
Open Employee Center	Widget	Open a new tab with the Purchase and Expense category in Employee Center.
Open ShoppingHub	Widget	Open a new tab with the ShoppingHub home page.

Configure your workspace landing page

You can configure the landing page using UI Builder, define different audiences for the landing page, and even add, remove, or modify the different content, if you want. However, it's recommended that you create a duplicate of the landing page before modifying it. For detailed information on how to configure using UI Builder, see Create a page in UI Builder.

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

Components in 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.
Create KPI template	Option	Opens the Create New KPI template form that enables you to create KPI templates.
Create segmentation rule	Option	Opens the Create New Segmentation rule form that enables you to build your segmentation rule by selecting specific conditions to filter the data from the supplier table.

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Components in Source-to-Pay Workspace (continued)

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.
	Filter: By type	Displays cases filtered by their type.
	Filter: By state	Displays cases filtered by their state.
	Filter: By priority	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.
	Filter: By type	Displays tasks filtered by their type.

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Components in Source-to-Pay Workspace (continued)

Title	Type	Description
	Filter: By state	Displays tasks filtered by their state.
	Filter: By priority	Displays tasks filtered by their priority.

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

Role-based access to quick actions in 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

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 Create a page in UI Builder.

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.

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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.

Landing page view for an Accounts Payable Specialist

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.

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Landing page view for an agent

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.

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.

Landing page view for task owner

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

POM landing page

As an operational buyer, use the Purchase Order Management (POM) landing page to view a snapshot of your assigned purchase exceptions and tasks and take actions to resolve them.

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Open the Purchase Order Management landing page by navigating to **Workspaces** > **Source-to-Pay Workspace**. Select the Purchase order management tab.

When you open the Purchase Order Management, 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.

Landing page view for an Operational Buyer

The following information is displayed on the landing page when you log in to the workspace with the Operational Buyer (sn_poem_core.operational_buyer) role.

Landing page view for an Operational Buyer

Title	Type	Description
Purchase order insights		
Top exceptions	Widget	View the exceptions that are assigned to you,sorted by priority and creation date. Up to four open exceptions are displayed, sorted by priority and creation, with exception sub-type, product model, impacted purchase order number, priority, and time lapsed since creation. Select **View Details** to view the purchase order exception details.
Open exceptions	Stacked bar chart	View all open exceptions sorted and color coded by priority. Point to a bar area to view the number of exceptions that fall within that priority. Select a bar area to view the complete list of records of that priority. Select **View all exceptions** to view the complete list of open exceptions assigned to you.
Incoming tasks	Widget	View the most recent purchase order exception tasks assigned to you. Tasks include purchase requisitions of type revision and approvals. Up to four tasks are displayed in this section sorted by recency, with recent items shown first. You can view the task type, action to be taken, affected purchase order number, and time elapsed since task creation. Select **View task** to view the task record.
All tasks for the last month	Trend line chart	View all your tasks over the last 30 days. Select the tasks count link in the chart to view all assigned exception tasks.
New activity today	Widget	View the count of new purchase order exceptions and purchase order exception tasks that were created and assigned to you in the last 24 hours. You can see up to five most recent exceptions and tasks. Select an exceptions number link to view a list of exceptions. Select the new tasks number link to view the exception tasks assigned to you. Select the Purchase order exception task to view PO exception task. Select the Purchase order revision requests to view PO revisions. Select

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Landing page view for an Operational Buyer (continued)

Title	Type	Description
		the Purchase order revision approvals to view PO revision approval tasks.
Activity overview		
All new exceptions	Widget	Displays the number of all new exceptions that are assigned to you. Select the exceptions count link to view the list.
All exceptions in progress	Widget	Displays the number of all in progress exceptions that are assigned to you. Select the exceptions count link to view the list.
All tasks	Widget	Displays the number of all exception tasks that are assigned to you. Select the exception tasks count link to view the list.

Source-to-Pay Workspace list page

The Source-to-Pay Workspace list page enables you to see high-level information for all records in a list filter.

The modules that are displayed on the list page vary depending on the Source-to-Pay Operations product that you have installed.

For example, if you have installed only Sourcing and Procurement Operations (SPO) and if you are assigned the Supplier Fulfiller [sn_slm.fulfiller] role, you can view only SPO modules on the list page.

If you have installed both Sourcing and Procurement Operations (SPO) and SLO and if you are assigned the Procurement Specialist [sn_shop.procurement_specialist] and Supplier Fulfiller [sn_slm.fulfiller] roles, the list page displays a combination of modules for both the installed products.

In the Source-to-Pay Workspace, select the list icon () to open the List page.

You can select each module and sub-module to view the details in a list. Under **Lists**, you can do the following:

- Refresh the list to display the most updated information.
- Edit columns to adjust the list to display required columns in the order of your choice.
- Reset column widths to default.
- Copy the URL for this list.
- Apply filters to view specific information that you are interested in.
- Export the list to a file in Excel, CSV, JSON, or PDF format.
- Create a copy of the list and save it under **My Lists**.

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.

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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**
  - 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**

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- 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

  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.

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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.

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.

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.

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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.
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. 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.

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- Create a copy of the list and save it under **My Lists**.
- Edit a selected supplier case or create a new supplier case.

As an Accounts Payable Specialist, you have access to the following modules and sub-modules:

- My Work
  - My open invoice processing cases
  - My open invoice exceptions
  - My open tasks
  - Unassigned cases
  - Unassigned tasks
- All Work
  - All open invoice processing cases
  - All open invoice exceptions
  - All open tasks
  - All closed cases
  - All closed tasks
- Primary Data
  - Suppliers
  - Purchase orders
  - Goods receipts
  - Invoices
  - Payment terms
  - Ledger accounts

As an agent, you have access to the following modules and sub-modules:

- My work in progress: Cases
- All team work: Cases
- My Work
  - My open invoice inquiry cases
  - My open tasks
  - Unassigned cases
  - Unassigned tasks
- All Work
  - All open invoice inquiry cases
  - All open tasks
  - All closed cases
  - All closed tasks
- Primary Data

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- Suppliers
- Purchase orders
- Invoices
- Payment terms

POM list page

As an Operational Buyer, use the list page to view all purchase order exceptions and work on the exceptions assigned to you.

In the Source-to-Pay Workspace, select the List icon to open the List page.

You can select each module and submodule 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**.

As a finance specialist, you have access to the following modules and submodules:

Modules and submodules

Modules	Submodules
My work	Open purchase order exceptions: Displays all purchase order exceptions assigned to you.
All work	• Open purchase order exceptions: Displays a list of all purchase order exceptions. • Closed purchase order exceptions: Displays a list of all closed purchase order exceptions.

Configure 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 Configure Supplier Lifecycle Operations.
- For more information on configuring Source-to-Pay Workspace, see Configure Accounts Payable Operations.

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AI search in Source-to-Pay Workspace

The AI search feature in the Source-to-Pay Workspace and Supplier Collaboration Portal enables users (with admin role and suppliers) to refine searches by filtering their results. You can search for procurement records, supplier records, and invoice records. You can choose to show or hide the AI search in your workspace.

Make record content searchable by configuring an indexed source to add it to the AI Search index. For more information on AI search indexing, see AI Search.

Change the general settings to Source-to-Pay Workspace experience in UI Builder to fit the needs of your organization. For example, you can modify the title, description, and path for your workspace experience. Use the Global search to show or hide the search functionality in Source-to-Pay Workspace. For more information on global search, see Display global search in a workspace experience.

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

Configure knowledge bases so that guest users can read the created knowledge articles from the Source-to-Pay Workspace.

Publish knowledge articles to enable guest users to read them from the Source-to-Pay Workspace

To enable guest users to read a knowledge article, add them to the Can Read list of the corresponding knowledge base in 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**.
   A guest user can now read the knowledge article from the Source-to-Pay Workspace.

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

You can publish a knowledge article from the from the Source-to-Pay Workspace.

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:

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- **Supplier articles**
- **Procurement articles**

4. Under the Number column, select the link to a knowledge article to open it.
5. Select **Publish**.
   A confirmation message appears, informing you that the knowledge article may be published and be visible to unauthenticated users.
6. Select **Publish**.

Use 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 Use Supplier Lifecycle Operations.
- For more information on using Source-to-Pay Workspace, see Use Accounts Payable Operations.

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.

Create New Known Error article form

Field	Description
Number	Read-only field. Unique number to identify the known error article.

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Field	Description
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.
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:

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- **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.

Create New Knowledge form

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.
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**.

AI Data Explorer using multiple tables

The AI Data Explorer interprets natural-language prompts to correlate data across multiple related Accounts Payable Operations, Sourcing and Procurement Operations, and Supplier Lifecycle Operations tables. Fulfillers get unified answers without manually exporting and joining data.

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Key benefits

Multi-table analysis with AI Data Explorer provides the following benefits:

- Correlates data across related entities, such as supplier, invoice, and purchase order, in a single query.
- Reduces the manual effort.
- Supports faster, more complete decision-making from a single prompt-based interaction.

How it works

A fulfiller enters a natural-language prompt describing the information they need. AI Data Explorer interprets the prompt, queries the relevant APO, SPO and SLO tables, and returns a consolidated answer.

- Queries can span multiple related tables, including invoice, supplier, approval, purchase order, and receipt data.
- Answers combine data from more than one table into a single result set.

Using AI Data Explorer in Source-to-Pay Operations

Use the AI Data Explorer in Source-to-Pay Operations to generate reports, visualizations, and data insights from APO, SPO and SLO workspace using natural language questions.

Before you begin

Role required: now_assist_explorer_user

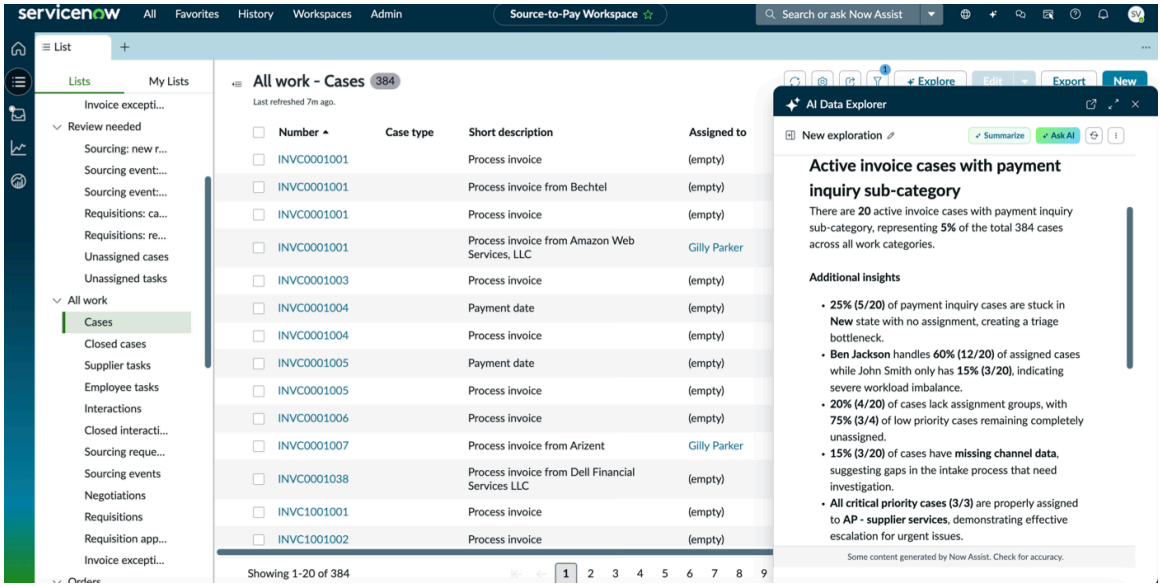
About this task

The AI Data Explorer enables fulfillers and requesters to generate reports, visualizations, and data insights through a conversational interface from Source-to-Pay workspace using natural language. Users input natural language prompts to query data without needing technical expertise in tables, filters, or data structures.

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed. The List page displays **Explore with AI** option. As a fulfiller or a requester you can explore data insights through conversational analytics. You can ask specific questions in AI Data Explorer, to which it responds with summary, and suggested follow-up questions as shown below:

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For more information on the extended data analysis, data visualization in AI data explorer, see Use AI to explore data with AI Data Explorer.
The AI-assisted, interactive exploration assists fulfillers in making data-driven decisions within the Source-to-Pay workspace.

Query multiple tables in AI Data Explorer

Use natural-language prompts to retrieve and correlate data from multiple related tables in a single answer.

Before you begin

Role required: fulfiller

About this task

Use this procedure when you need to combine data from multiple related tables, such as invoices, suppliers, purchase orders, and approvals.

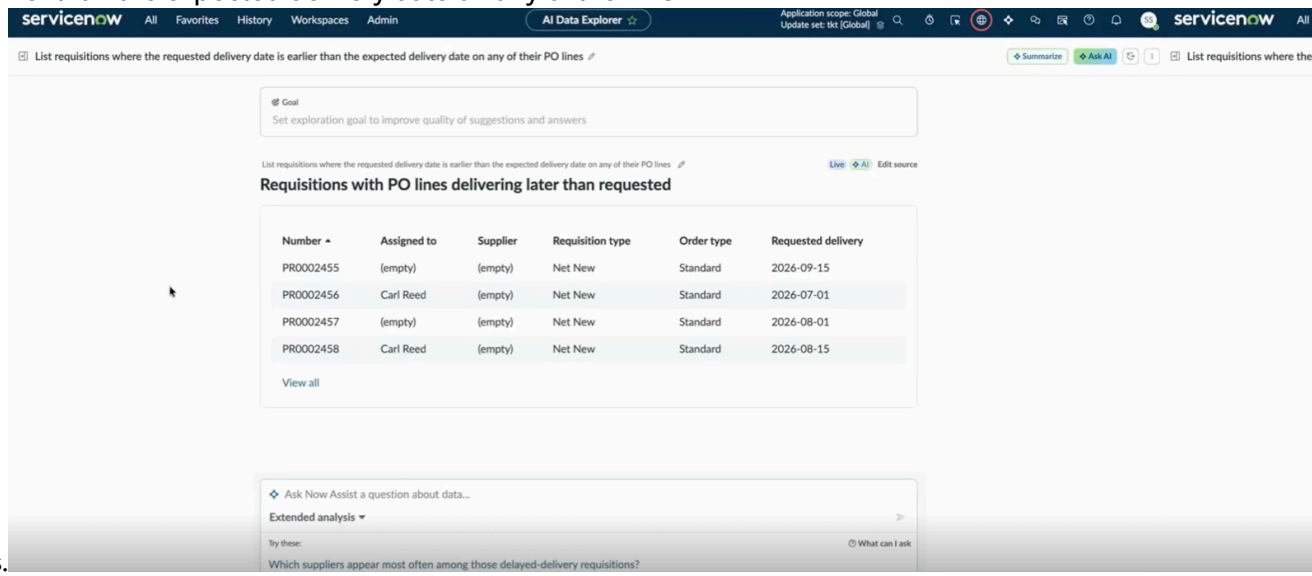
> **Warning:**
>
> Generative AI may produce inaccurate or incomplete information. Always validate AI-generated content and implement human review of results.

Procedure

1. Navigate to **AI Data Explorer**.
2. In the prompt field, enter your question in natural language.

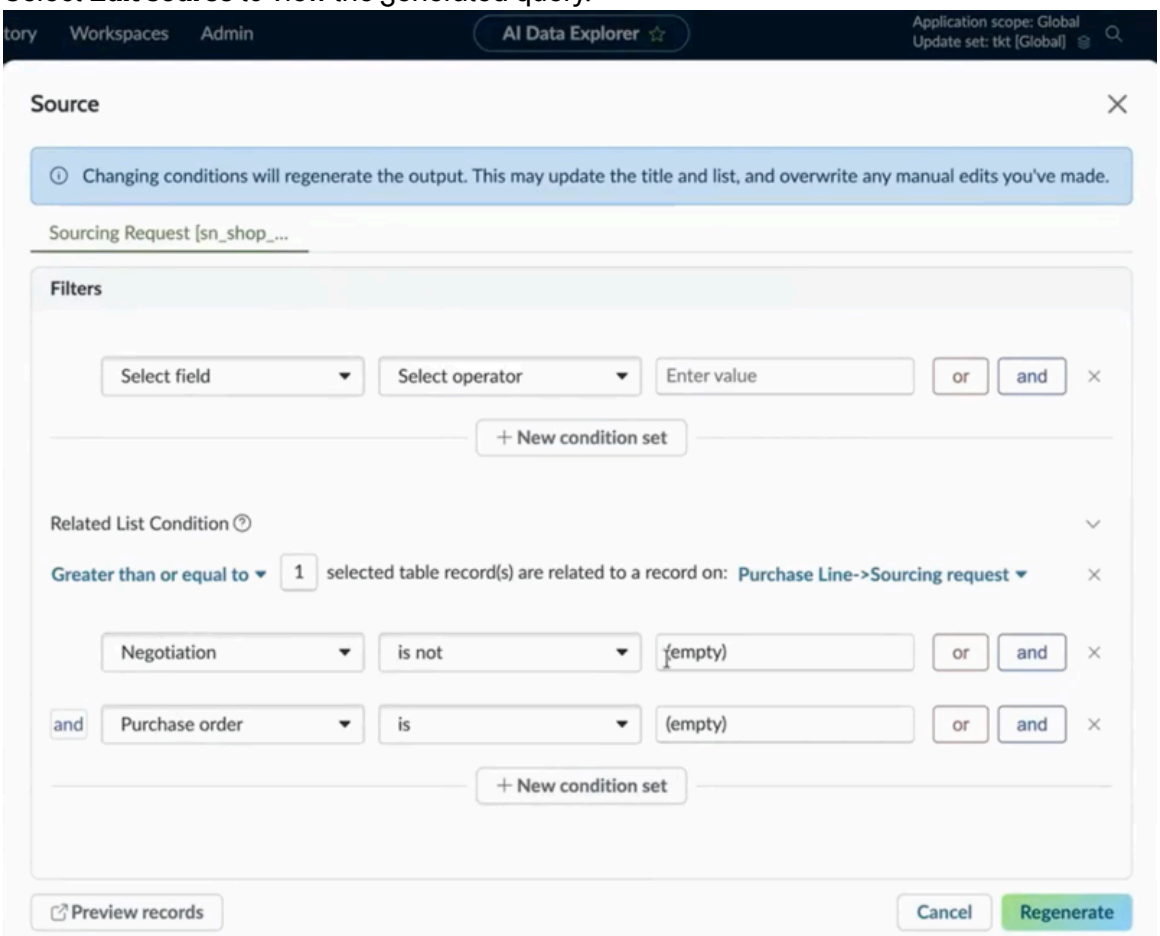
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Example: List requisitions where the requested delivery date is earlier than the expected delivery date on any of their PO lines.



The interface displays the generated query and results from the relevant tables.

3. Select **Edit source** to view the generated query.



Result

AI Data Explorer interprets your prompt and returns a consolidated answer that combines data from the relevant related tables.

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Source-to-Pay Workspace Reference

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

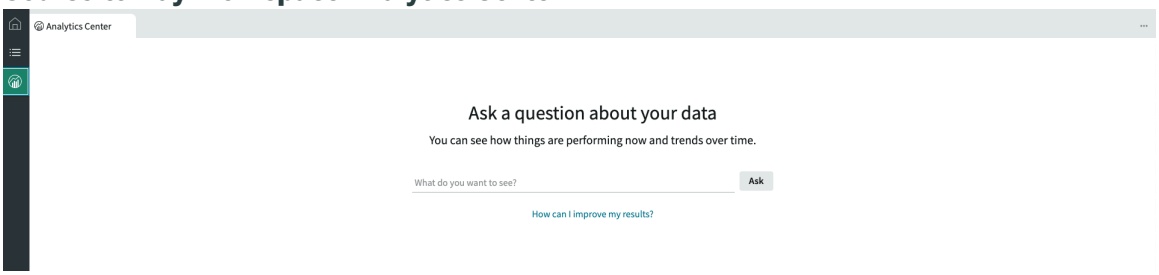
- For more information on Sourcing and Procurement Operations, see SPO landing page.
- For more information on Supplier Lifecycle Operations, see SLO landing page.
- For more information on Source-to-Pay Workspace, see APO landing page.

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.

Source-to-Pay Workspace Analytics Center



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

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    - Show me all open sourcing requests
    - Show me all closed sourcing requests
- Negotiation: Active
    - Show me all open negotiations
    - Show me all closed negotiations
- Purchase line: Product type
    - Show me all purchase lines of type good
    - Show me all purchase lines of type goods
    - Show me all purchase lines of type service
- Purchasing tasks and all extensions of purchasing tasks: Active
    - Show me all open <task type>
    - Show me all closed <task type>
- Purchase order: Order type
    - Show me purchase orders of type standard
    - Show me purchase orders of type blanket
- Purchase order line: Product type
    - Show me all purchase order lines of type good
    - Show me all purchase order lines of type goods
    - Show me all purchase order lines of type service
- Milestones
    - Completion date
        - Show me upcoming milestones
        - Show me today's milestones
        - Show me past milestones
        - Show me historical milestones
    - Active
        - Show me all open milestones
        - Show me all closed milestones
- Receipt tasks: Active
    - Show me all open receipt tasks
    - Show me all closed receipt tasks
- Procurement cases: Active
    - Show me all open procurement cases
    - Show me all closed procurement cases

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.

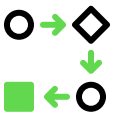
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If you do not get the desired search results, select **How can I improve my results?** to view tips and suggestions on improving your search.

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.

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.

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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.

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.

Source-to-Pay integration with Oracle Financial Cloud

Integrate Source-to-Pay Operations with Oracle Financial Cloud to manage sales orders, procurement, and financial processes in Oracle Financial Cloud from your ServiceNow instance. For more information, see Source-to-Pay integration with Oracle Financial Cloud.

Integrations

- Source-to-Pay integration framework
- Source-to-Pay integration with SAP
- 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 with Oracle Financial Cloud

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:

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

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.

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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.

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
City	String	Name of the city where the CMN location belongs.

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CMN Location Stage inbound staging table (continued)

Field	Data type	Description
Country	String	Name of the country where the CMN location belongs.
Country key	String	Country key of the CMN location.
Default	String	Indicates whether the CMN location is default or not.
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.
Legal entity	String	Name of the legal entity
Location	String	Coordinates or details of the CMN location.
Name	String	Name of the CMN location.
Plant	String	Name of the plant at the CMN location.
Postal code	String	Postal code of the CMN location.
Region	String	Region name of the CMN location.
State	String	State / province of the CMN location.
Street	String	Street of the CMN location.
Street and house number	String	Street and house number of the CMN location.
Zip	String	Zip code of the CMN location.

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.

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.

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Catalog Import (continued)

Fields	Data type	Description
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.
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.

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Catalog Import (continued)

Fields	Data type	Description
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. You can use this table to lookup all the cost center details.

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

Cost Center Stage inbound staging table

Field	Data type	Description
Account number	String	Account number of the cost center
Available for user	String	Users that are applicable to the cost center
Code	String	Code of the cost center

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Cost Center Stage inbound staging table (continued)

Field	Data type	Description
Cost center type	String	Type of cost center
Controlling area	String	Controlling area of the cost center
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.
Legal entity	String	Detailed information about individual suppliers, including banking details, payment methods, and credit terms.
Manager	String	Name of the manager of the cost center
Name	String	Name of the cost center
Profit center	String	Profit centers within the organization, enabling financial reporting and analysis by business units or operational segments.
Valid from	String	Date the cost center is valid from
Valid to	String	Date the cost center is valid to

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
Category ID/ERP Department ID	String	Unique ID of the Category or ERP department.
Department name	String	Name of the department.
Department head	String	Name of the head of the department.
Description	String	Description of the department.
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.
Primary contact	String	Primary contact details of the department.

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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.

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
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.
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.

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FX Rate Stage inbound staging table (continued)

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. 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.

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.

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Fixed asset details stage (continued)

Field	Data type	Description
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.

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
Account currency	String	Currency name of the GL account.
Account name	String	Name of the GL account.
Alternate currency	String	Alternate currency name of the GL account.

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GL Account Stage inbound staging table (continued)

Field	Data type	Description
Category	String	Category of the GL account.
Entity	String	Name of the entity.
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	Name of the general ledger account.
Inactive	String	Status of the GL account. By default the checkbox is inactive.
Ledger type	String	Type of ledger account.
Local currency	String	Local currency that corresponds to the entity's operating location.
Number	String	General ledger account number.
Short description	String	Description of the GL account.
Sub-ledger account	String	Sub-ledger account number.
Type	String	Type of GL account.

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.

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Import Availability Updates inbound staging table (continued)

Field	Data type	Description
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.

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.

Cost Allocation inbound staging table (Deprecated)

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

Important: This table is deprecated; please use the new one in the ERP integration framework instead. For more information, see KB2186786.

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

Cost Allocation inbound 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.

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Cost Allocation inbound staging table (continued)

Field	Data type	Description
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.

Invoice inbound staging table

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

Invoice inboumd staging table

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

Invoice inbound 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.

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Invoice inbound staging table (continued)

Field	Data type	Description
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.
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.

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Invoice inbound staging table (continued)

Field	Data type	Description
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.

Purchase Order inbound staging table

The Purchase Order inbound [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 Purchase Order inbound [sn_fcms_intg_imp_order] staging table.

Purchase Order inbound 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.

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Purchase Order inbound staging table (continued)

Field	Data type	Description
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.
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.

Purchase Order Line inbound staging table

The Purchase Order Line inbound [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 Purchase Order Line inbound [sn_fcms_intg_imp_order_line] staging table.

Purchase Order Line 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 PO number	String	Purchase order number from the ERP system.

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Purchase Order Line inbound staging table (continued)

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

Receipt inbound staging table

The Receipt inbound [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 Receipt inbound [sn_fcms_intg_imp_receipt] staging table.

Receipt inbound 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.
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.

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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.
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.

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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.
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.

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Payment Terms Stage inbound staging table

Field	Data type	Description
Discount days	Integer	Specific days or periods during which you receive discounts on products.
Discount percentage	Decimal	Cash discount percentage rate.
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	The name or code of the payment term. Example: Net 060.
Net days to pay	Integer	Number of days within which payment is due after receiving an invoice.
Payment term	String	Term for making the payment.
Short description	String	A short explanation of the payment term. Example: 2%14, Net 60.
Type	String	Type of the payment term.

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.

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

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Price Import staging table (continued)

Field	Data type	Description
		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.

Product Model Stage inbound staging table

Field	Data type	Description
Asset tracking	String	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.
Description	String	Description of the product model for the buyer.
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 category	String	Category to which the model belongs to.

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Product Model Stage inbound staging table (continued)

Field	Data type	Description
Model number	String	Specific model number that is assigned to the item by the manufacturer.
Name	String	Name of the product model.
Product category	String	Category to which the product belongs to.
Short description	String	Brief description of 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.
Legal entity	String	Detailed information about individual suppliers, including banking details, payment methods, and credit terms.
Name	String	Name of the purchase entity.

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

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
		if product type is Service or Handling fee. The values are: • 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.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Estimated shipping	String	Shipping cost estimate for the product based on the delivery location.
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.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Negotiation	String	Negotiation associated with this purchase line.
Net amount	String	Amount included as a cost allocation on the purchase 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.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Purchase	String	Parent purchase associated with this purchase line.
Purchase order	String	Purchase order associated with the purchase line.
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.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Street	String	Street address of the purchase line.
Supplier	String	Supplier for which the shopper places the order.
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.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
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.
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.

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Purchase Requisition stage (continued)

Field	Data type	Description
Assigned to	String	Individual or department responsible for reviewing, approving, and processing the purchase requisition (PR).
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.

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Purchase Requisition stage (continued)

Field	Data type	Description
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 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.

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Purchase Requisition stage (continued)

Field	Data type	Description
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.
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.

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Spend Shipment Import inbound staging table (continued)

Field	Data type	Description
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.
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.

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Supplier Product Stage inbound staging table (continued)

Field	Data type	Description
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. **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.

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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.

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.

Unit of Measure inbound staging table

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

Unit of Measure

Field	Data type	Description
ERP Unit	String	Name of the base ERP unit.
ERP Unit Description	String	Description of the base ERP unit.
ERP Source	String	ERP source used by the organization.

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Unit of Measure (continued)

Field	Data type	Description
Set	Reference	Reference to an external data source for importing data.

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.

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.

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Supplier inbound staging table (continued)

Field	Data type	Description
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. 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)

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Supplier inbound staging table (continued)

Field	Data type	Description
		• 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.
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.

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Supplier inbound staging table (continued)

Field	Data type	Description
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.

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
Category	String	The category that the supplier location belongs to. The choices are:

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Supplier location inbound staging table (continued)

Field	Data type	Description
		• Contracting address • Delivery address • Facility (default) • Headquarters • Invoice address • Service center
City	String	City of the supplier location.
Company	String	Name of the company that the supplier location is linked to.
Contact	String	Contact details of the supplier location.
Coordinates retrieved on	String	Coordinates of the supplier location that was retrieved on a specific date.
Country	String	Country of the supplier location.
Duplicate	String	Indicates whether the supplier location is a duplicate or not.
ERP source	String	ERP source from which data is imported.
Fax phone	String	Fax phone details of the supplier location.
Full name	String	Full name of the supplier location.
Integration status	String	Latitude coordinates of the supplier location.
Latitude	String	Latitude coordinates of the supplier location.
Location source	String	Source of the supplier location.
Location type	String	Type of the supplier location.
Longitude	String	Longitude coordinates of the supplier location.
Managed by group	String	Name of the group that manages the supplier location.
Name	String	Name of the supplier.
Primary	String	Indicates whether the supplier is primary or not.
Primary location	String	Primary location of the supplier.
Phone	String	Phone number of the supplier.
Phone territory	String	Phone territory of the supplier.
Processing message	String	A message that describes the current processing status.
State / Province	String	State 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	Timezone of the supplier location.
Zip/Postal code	String	Zip code of the supplier location.

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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.

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.

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Invoice import inbound staging table (continued)

Field	Data type	Description
		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.
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.

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Invoice import inbound staging table (continued)

Field	Data type	Description
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.

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.

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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. 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.

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Invoice line import inbound staging table (continued)

Field	Data type	Description
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.

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.

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Invoice payment detail import inbound staging table (continued)

Field	Data type	Description
		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.
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.

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Invoice payment detail import inbound staging table (continued)

Field	Data type	Description
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.

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.

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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**.
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.

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Outbound Cost Allocation staging table (continued)

Field	Data type	Description
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.
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.

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Outbound Order staging table (continued)

Field	Data type	Description
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.

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.

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Outbound Order Line staging table (continued)

Field	Data type	Description
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.
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.

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Outbound Order Line staging table (continued)

Field	Data type	Description
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.
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.

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Outbound Receipt staging table (continued)

Field	Data type	Description
		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.
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.

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Third-party Registration outbound staging table (continued)

Field	Data type	Description
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.

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.

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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.
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.

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Supplier contact outbound staging table (continued)

Field	Data type	Description
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.
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.

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Supplier legal entity mapping outbound staging table (continued)

Field	Data type	Description
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.
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.

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Supplier location outbound staging table (continued)

Field	Data type	Description
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.

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.

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Supplier outbound staging table (continued)

Field	Data type	Description
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.
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.

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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.
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.

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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.
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.

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Outbound invoice staging table (continued)

Field	Data type	Description
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.
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.

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Outbound invoice staging table (continued)

Field	Data type	Description
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.
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.

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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.
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.

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Outbound invoice line staging table (continued)

Field	Data type	Description
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.

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.

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Outbound invoice tax line staging table (continued)

Field	Data type	Description
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.

Transform map details

Transform map	Description
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.
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.
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.

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Transform map details (continued)

Transform map	Description
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.
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. Transform legal entities:
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.
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.
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 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.

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Transform map details (continued)

Transform map	Description
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.
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.

Subflows

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

Subflow details

Subflows	Description
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

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Subflow details (continued)

Subflows	Description
	sn_fcms_intg_supplier_legal_entity_outbound staging table.
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.

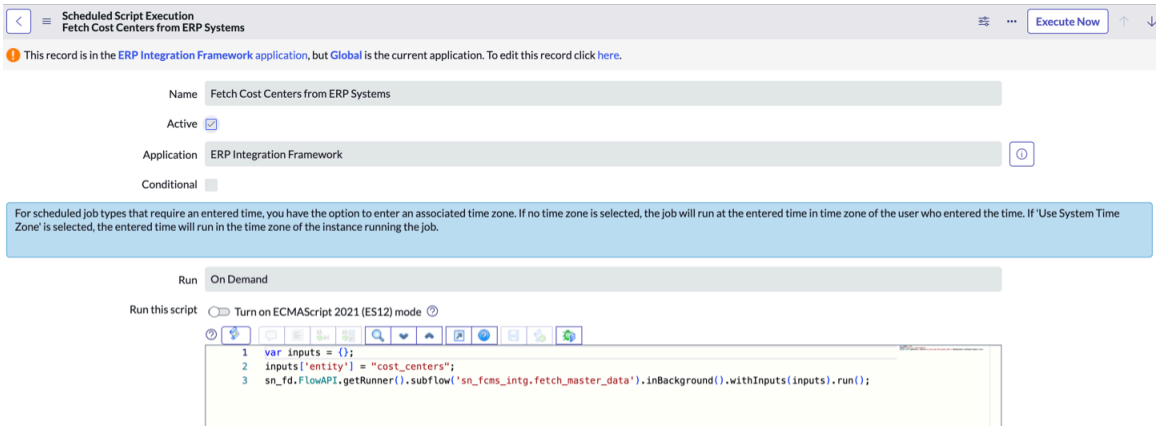
Scheduled jobs to fetch primary data

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.

Tables containing 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.

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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.

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.

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- Fetch cost center.

  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.

ERP Integration Framework

The Source-to-Pay (S2P) ERP Integration Framework enables seamless data exchange between ServiceNow and third-party Enterprise Resource Planning (ERP) systems. This framework supports comprehensive integration of primary data, transactional data (purchase orders, receipts, invoices), fixed assets, and tax information across multiple ERP instances.

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Key Features

- User-defined primary data that can be customized to organizational needs.
- Mapped to organizational legal entities for clear data governance.
- Associated with target ERP systems for bidirectional data flow.
- Flexible configuration enabling multiple sources for an organization.

ERP Sources

An ERP Source represents a specific ERP instance from which data is imported and to which data is exported. Organizations typically maintain multiple ERP instances as systems of record, with each ERP source mapped to a legal entity within the organization.

ERP Integration Requirements

- At least one ERP source must be configured for each legal entity within every target instance.
- Each ERP source should be associated with a specific target ERP system.
- Organizations can create as many ERP sources as needed to support their structure.

The integration framework clearly defines the system of record responsibilities:

- Third-party ERP: System of record for primary data entities
- Source-to-Pay: System of record for purchase orders and receipts
- Either system: Invoices can be created manually in Source-to-Pay or through external supplier portals

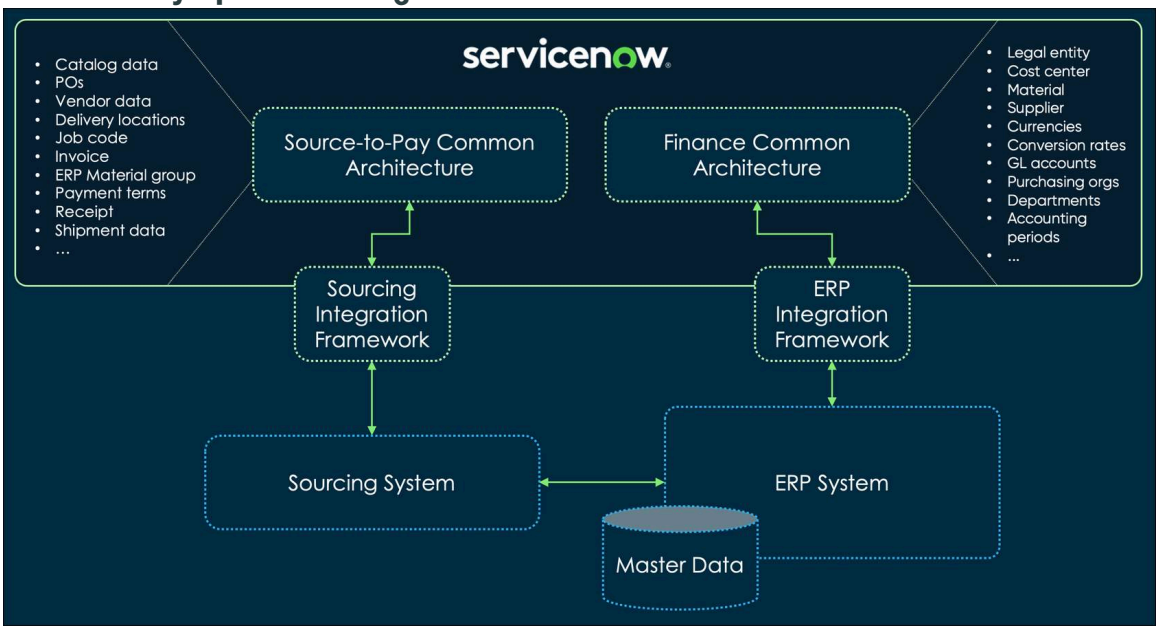
Integration Architecture

The ERP Integration Framework application loads primary data into Source-to-Pay Operations, enabling various ServiceNow workflows. It also imports selected inbound transactional data objects such as purchase order data that are shared across all Source-to-Pay Operations products.

Both the ERP Integration Framework and Source-to-Pay Integration Framework applications provide an abstraction layer between the Source-to-Pay application and backend systems. This design shields Source-to-Pay workflows and data models from backend-specific integration components and data structures.

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Source-to-Pay Operations Integration Architecture



Required Applications

The integration requires the Finance – ERP Integration store application to be installed.

MID Server Requirement

A MID Server is required for ERP integrations using SOAP services. The MID Server must be installed and configured to connect to the ERP system server. See Installing the MID Server for details.

Note: MID Server integration is only required for SOAP-based integrations, not for REST-based integrations.

User Roles and Permissions

The ERP Integration Framework supports the following roles and permissions:

Role name	Capabilities
Administrator (sn_fcms_intg.admin)	• Install integration applications • Configure system-wide settings • Manage all aspects of the integration infrastructure
Procurement Specialist (sn_shop.procurement_specialist)	• Define and manage ERP sources • Configure ERP source parameters • Manage integration workflows

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Role name	Capabilities
FCA Integration user (sn_fcms_intg.integration_user)	• Configure ERP source settings including web service authorization • Set up web services for Park and Post, Reverse operations • Manage user and role mappings • Access inbound and outbound staging tables • Configure and execute integration processes

Additional roles for the FCA Integration user (sn_fcms_intg.integration_user):

- Import_transformer: For data transformation operations
- SOAP: For SOAP-based web service integrations

Granular roles

Users assigned the integration admin role (`sn_fcms_intg.admin`) are granted read and write permissions for these system properties. This access aligns with the granular role modifications as per the new directives.

Property Name	Read role	Write role
sn_fcms_intg.status_for_purchase_order	sn_shop.shopper, sn_shop.procurement_common_reader, sn_fcms_intg.admin	sn_fcms_intg.admin
sn_fcms_intg.status_for_invoice_creation	sn_fcms_intg.admin, sn_ap_apm.accounts_payable_specialist	sn_fcms_intg.admin
sn_fcms_intg.status_for_goods_receipt	sn_shop.shopper, sn_shop.procurement_common_reader, sn_fcms_intg.admin	sn_fcms_intg.admin

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.

The following table lists the 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.

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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.

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

Supplier Location inbound staging table

Field	Data type	Description
Category	String	The category that the supplier location belongs to. The choices are: • Contracting address • Delivery address • Facility (default) • Headquarters • Invoice address • Service center
City	String	City of the supplier location.
Company	String	Name of the company that the supplier location is linked to.
Contact	String	Contact details of the supplier location.
Coordinates retrieved on	String	Coordinates of the supplier location that was retrieved on a specific date.
Country	String	Country of the supplier location.
Duplicate	String	Indicates whether the supplier location is a duplicate or not.
ERP source	String	ERP source from which data is imported.
Fax phone	String	Fax phone details of the supplier location.
Full name	String	Full name of the supplier location.
Integration status	String	Latitude coordinates of the supplier location.
Latitude	String	Latitude coordinates of the supplier location.
Location source	String	Source of the supplier location.
Location type	String	Type of the supplier location.
Longitude	String	Longitude coordinates of the supplier location.
Managed by group	String	Name of the group that manages the supplier location.
Name	String	Name of the supplier.
Primary	String	Indicates whether the supplier is primary or not.
Primary location	String	Primary location of the supplier.
Phone	String	Phone number of the supplier.

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Supplier Location inbound staging table (continued)

Field	Data type	Description
Phone territory	String	Phone territory of the supplier.
Processing message	String	A message that describes the current processing status.
State / Province	String	State 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	Timezone of the supplier location.
Zip/Postal code	String	Zip code of the supplier location.

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.

The following table lists the 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.

Supplier Legal Entity Mapping inbound staging table

The Supplier Legal Entity Mapping inbound [sn_sap_data_int_supplier_stg] 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. This staging table is delivered in a separate SAP data-integration scope rather than sn_fcms_intg, but it is populated as part of primary supplier data.

Note: Fields listed are the confirmed core mapping fields. The complete field list for sn_sap_data_int_supplier_stg (SAP data-integration scope) was not available in the reference source and must be validated with the SME before publishing.

The following table lists the fields for the Supplier Legal Entity Mapping inbound [sn_sap_data_int_supplier_stg] 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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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. You can use this table to lookup all the cost center details.

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

Cost Center Stage inbound staging table

Field	Data type	Description
Account number	String	Account number of the cost center
Available for user	String	Users that are applicable to the cost center
Code	String	Code of the cost center
Cost center type	String	Type of cost center
Controlling area	String	Controlling area of the cost center
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.
Legal entity	String	Detailed information about individual suppliers, including banking details, payment methods, and credit terms.
Manager	String	Name of the manager of the cost center
Name	String	Name of the cost center
Profit center	String	Profit centers within the organization, enabling financial reporting and analysis by business units or operational segments.
Valid from	String	Date the cost center is valid from
Valid to	String	Date the cost center is valid to

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 fields for the Department Stage inbound [sn_fcms_intg_department_stage] staging table.

Department Stage inbound staging table

Field	Data type	Description
Category ID/ERP	String	Unique ID of the Category or ERP department.

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Department Stage inbound staging table (continued)

Field	Data type	Description
Department ID		
Department name	String	Name of the department.
Department head	String	Name of the head of the department.
Description	String	Description of the department.
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.
Primary contact	String	Primary contact details of the department.

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.

The following table lists the 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
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.
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 the 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.

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FX Rate Stage inbound staging table (continued)

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. 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.

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 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
Account currency	String	Currency name of the GL account.
Account name	String	Name of the GL account.
Alternate currency	String	Alternate currency name of the GL account.
Category	String	Category of the GL account.
Entity	String	Name of the entity.
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.

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GL Account Stage inbound staging table (continued)

Field	Data type	Description
GL Account	String	Name of the general ledger account.
Inactive	String	Status of the GL account. By default the checkbox is inactive.
Ledger type	String	Type of ledger account.
Local currency	String	Local currency that corresponds to the entity's operating location.
Number	String	General ledger account number.
Short description	String	Description of the GL account.
Sub-ledger account	String	Sub-ledger account number.
Type	String	Type of GL account.

Purchase Order Line inbound staging table

The Purchase Order Line inbound [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 fields for the Purchase Order Line inbound [sn_fcms_intg_imp_order_line] staging table.

Purchase Order Line 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 PO number	String	Purchase order number from the ERP system.
ERP PO line number	String	Purchase order line number from the ERP system.

Purchase Order inbound staging table

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

Note: The ERP Integration Framework source table lists this table as PO Response Stage (sn_fcms_intg_imp_po_response). The scoped name here (sn_fcms_intg_imp_order) is carried over from the existing reference topic. Confirm the correct scoped name with the SME.

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

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Purchase Order inbound 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.
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.

Receipt inbound staging table

The Receipt inbound [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 fields for the Receipt inbound [sn_fcms_intg_imp_receipt] staging table.

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Receipt inbound 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.
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.

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Legal Entity Stage inbound staging table (continued)

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. This is a mandatory field.
Global company	String	Global company that the entity is linked to.
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.

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 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
City	String	Name of the city where the CMN location belongs.
Country	String	Name of the country where the CMN location belongs.
Country key	String	Country key of the CMN location.
Default	String	Indicates whether the CMN location is default or not.
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.
Legal entity	String	Name of the legal entity
Location	String	Coordinates or details of the CMN location.
Name	String	Name of the CMN location.
Plant	String	Name of the plant at the CMN location.
Postal code	String	Postal code of the CMN location.
Region	String	Region name of the CMN location.

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CMN Location Stage inbound staging table (continued)

Field	Data type	Description
State	String	State / province of the CMN location.
Street	String	Street of the CMN location.
Street and house number	String	Street and house number of the CMN location.
Zip	String	Zip code of the CMN location.

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 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.

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 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
Discount days	Integer	Specific days or periods during which you receive discounts on products.
Discount percentage	Decimal	Cash discount percentage rate.
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	The name or code of the payment term. Example: Net 060.

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Payment Terms Stage inbound staging table (continued)

Field	Data type	Description
Net days to pay	Integer	Number of days within which payment is due after receiving an invoice.
Payment term	String	Term for making the payment.
Short description	String	A short explanation of the payment term. Example: 2%14, Net 60.
Type	String	Type of the payment term.

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 fields for the CMDB Model Category Stage inbound [sn_fcms_intg_cmdb_model_category_stage] staging table.

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.

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 fields for the Product Model Stage inbound [sn_fcms_intg_cmdb_model_stage] staging table.

Product Model Stage inbound staging table

Field	Data type	Description
Asset tracking	String	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.

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Product Model Stage inbound staging table (continued)

Field	Data type	Description
Description	String	Description of the product model for the buyer.
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 category	String	Category to which the model belongs to.
Model number	String	Specific model number that is assigned to the item by the manufacturer.
Name	String	Name of the product model.
Product category	String	Category to which the product belongs to.
Short description	String	Brief description of 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 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.
Legal entity	String	Detailed information about individual suppliers, including banking details, payment methods, and credit terms.
Name	String	Name of the purchase entity.

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 fields for the CMDB Service Model Stage inbound [sn_fcms_intg_cmdb_service_model_stage] staging table.

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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.

Supplier Stage inbound staging table

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

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

Supplier Stage 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 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.

The following table lists the 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.

Source-to-Pay integration with SAP

The Source-to-Pay integration with SAP enables you to send purchase orders, receipts, and invoices created on the SAP from your ServiceNow instance. This integration helps in looking up or extracting primary data objects from SAP into ServiceNow.

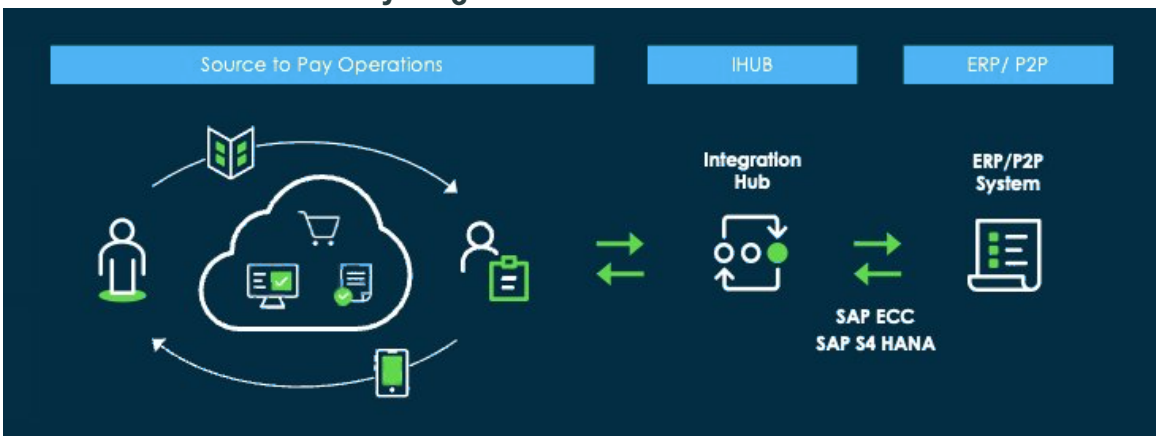
Key features

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.
- Cancel purchase orders in SAP.
- Create good receipts in SAP.
- Create invoices in SAP.

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Overview of the Source-to-Pay integration with SAP



Prerequisites

First, you must activate the Source-to-Pay integration with the SAP application from the ServiceNow Store. This automatically activates the SAP ECC, SAP S4 Public, and SAP S4 HANA OData 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 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 system through REST APIs.

Explore Source-to-Pay integration with SAP

Learn more about the Source-to-Pay integration with SAP.

Establishing communication between the SAP and ServiceNow instances

The Source-to-Pay integration with SAP supports the following APIs:

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- 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.

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 the SAP system in the Connection and Credential alias table.

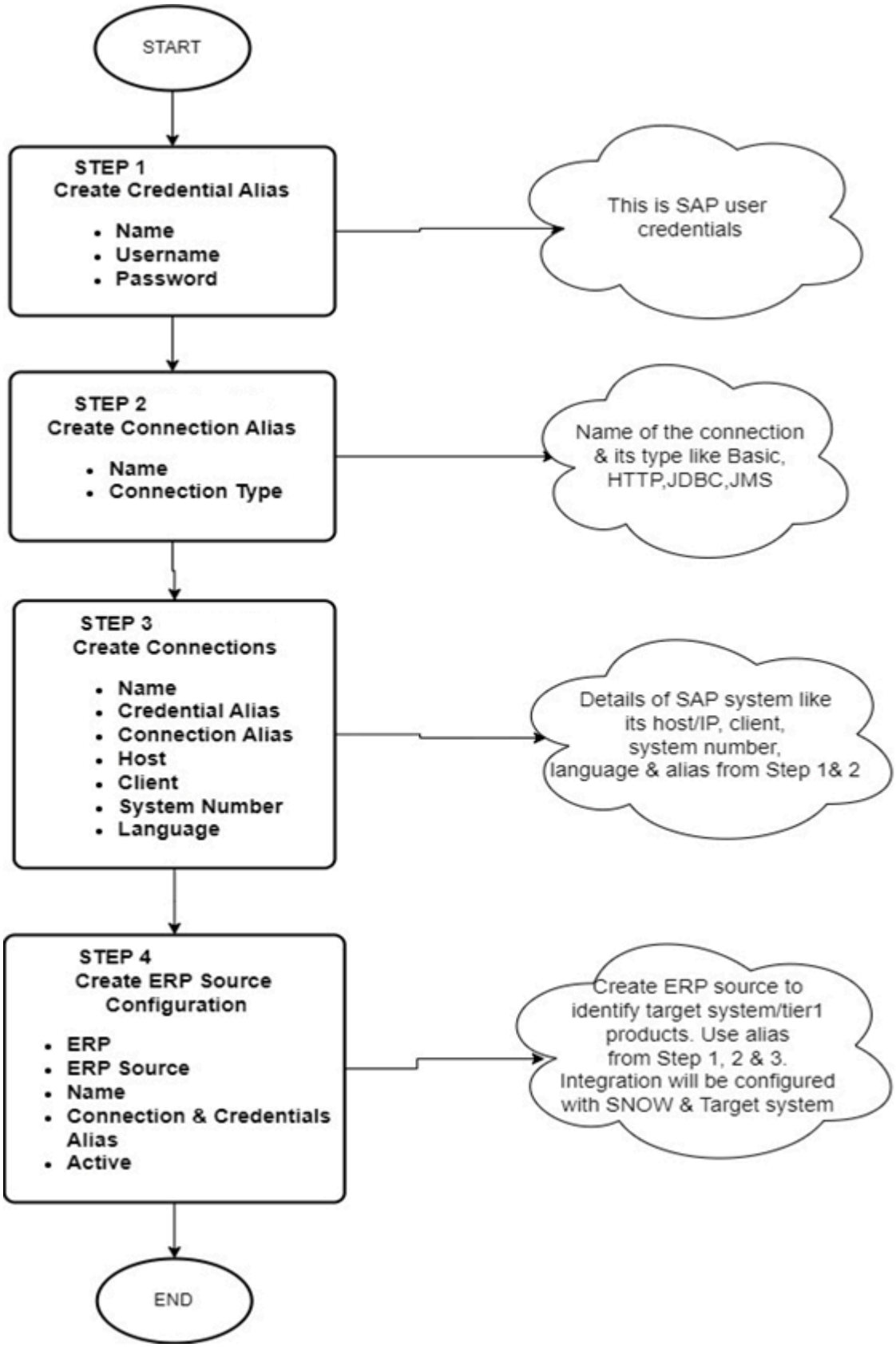
Step 2 - Create Credential for connecting to the SAP system.

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Step 3 - Add MID Server and credentials to the connection.

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

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



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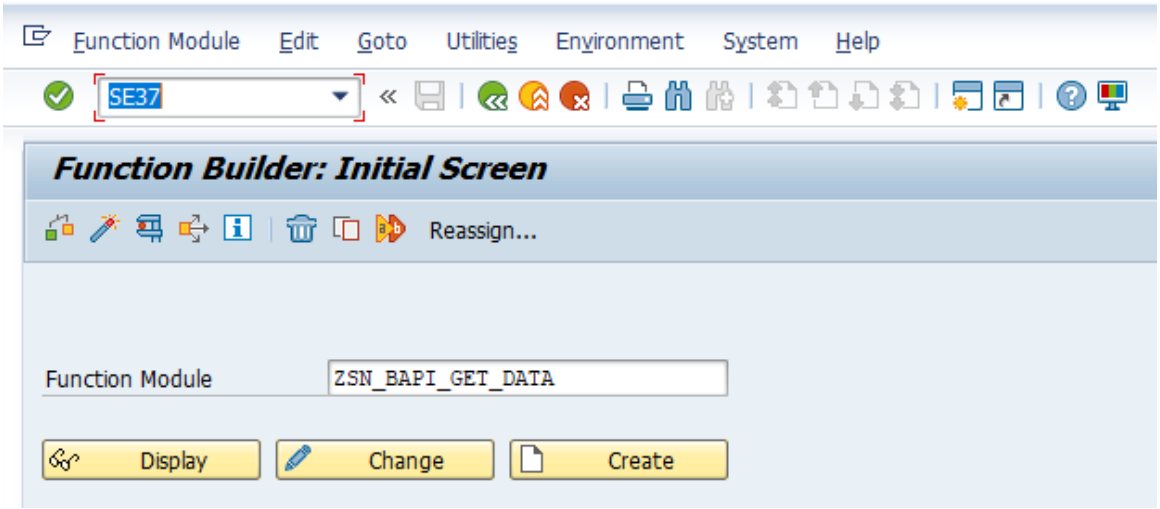
Name: ZSN_BAPI_GET_DATA

Query parameters to execute RFC

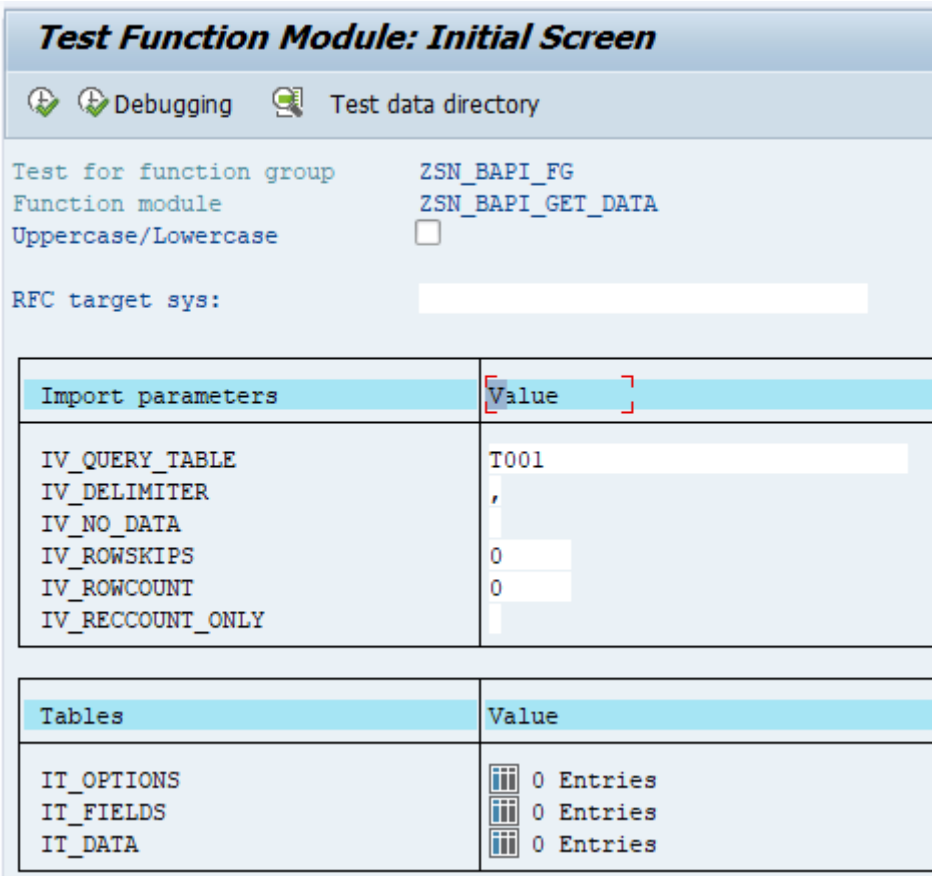
Title	Type	Description
Input		
1	Connection Alias -	Connection Alias for SAP ECC – RFC
2	RFC	The Reference to records (SAP RFC Name and Application component) in SAP RFC Table
3	Input	Input fields for the selected RFC, represented in a flat structure
Output		
1	Response	The response for the execution of selected RFC at SAP
2	Action Status	If the request is executed successfully, Status is set to “Success”. If there’s 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

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- **Function Builder Initial Screen**

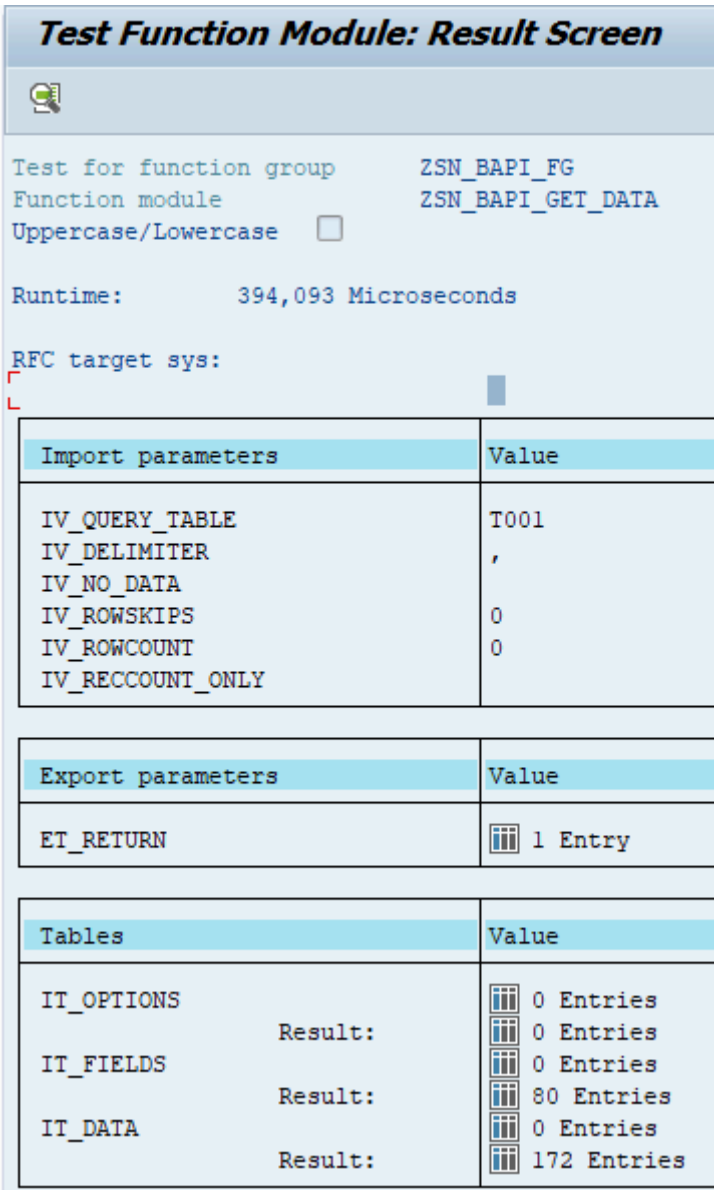


- **Enter the IMPORT, CHANGING, and TABLES parameters**



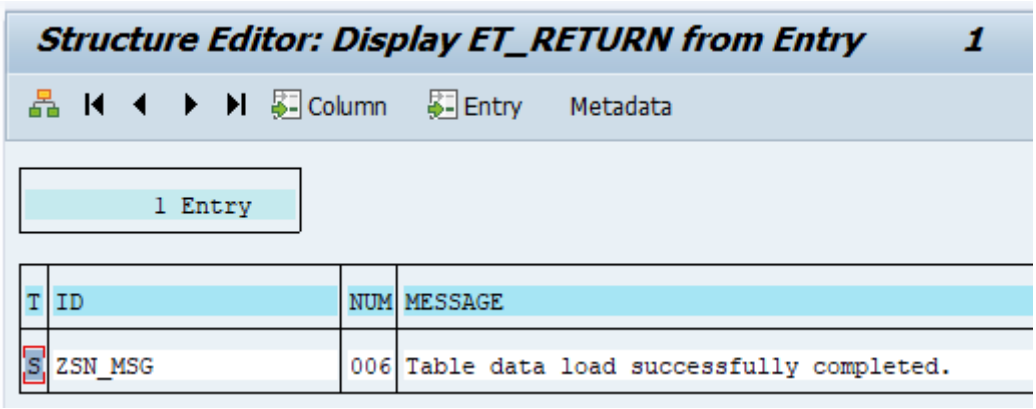
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- **Results data**

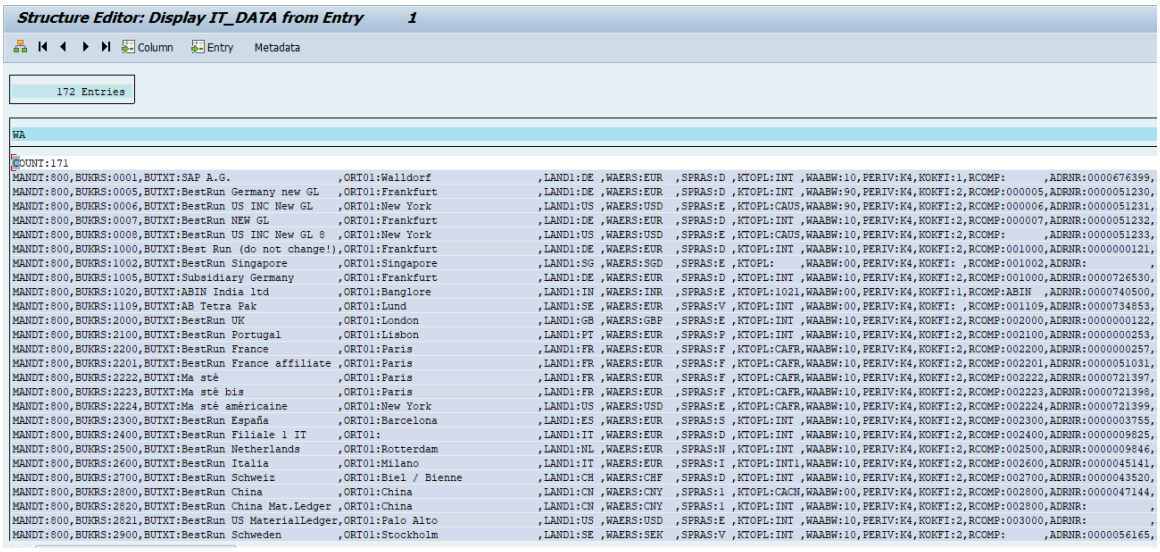


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- **Results data**



Results data



Configure the Source-to-Pay integration with SAP

Integrate the ServiceNow instance with SAP 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 application from ServiceNow Store. This automatically activates the SAP ECC, SAP S4 HANA, and SAP S4 HANA OData 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 uses the Source-to-Pay integration framework to pull tasks from SAP 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 Dependencies with SAP Dependencies

Install the following dependencies of Primary Data integration with SAP. 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 Integration that pulls tasks into ServiceNow. For more information, see Use schedule flows in SAP.

Primary Data Integration Dependencies with SAP

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

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

Supplier Lifecycle Operations Integration Dependencies with SAP

App name	Plugin ID
Primary Data Integration with SAP	sn_sap_data_int
ERP Integration Framework	sn_fcms_intg
Finance Common Architecture	sn_fin
Supplier Operations	sn_so

Sourcing and Procurement Operations Integration Dependencies with SAP

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

Sourcing and Procurement Operations Integration Dependencies with SAP

App name	Plugin ID
Primary Data Integration with SAP	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

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Accounts Payable Operations Integration Dependencies with SAP

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

Accounts Payable Operations Integration Dependencies with SAP

App name	Plugin ID
Primary Data Integration with SAP	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

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:
  - 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, follow these steps:

1. Define the ERP source that you want to integrate with SAP integration.
2. Create a basic authentication profile that can be used for web service integration with SAP.

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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.
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.
   - **Legal Entities**

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

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

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

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

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

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

     Set up subflows for the source configuration to lookup GL accounts from SAP.
   - **Plant Addresses**

     Set up subflows for the source configuration to lookup plant addresses from SAP.
   - **Suppliers**

     Set up subflows for the source configuration to lookup suppliers from SAP.
   - **Product Models**

     Set up subflows for the source configuration to lookup product models from SAP.
   - **Invoices**

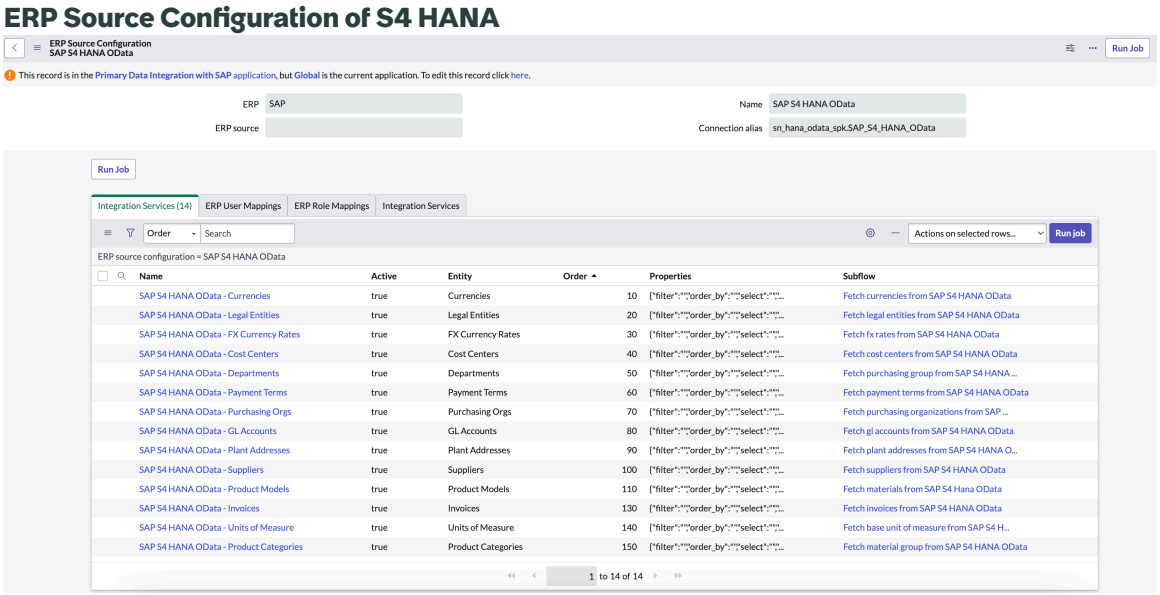
     Set up subflows for the source configuration to lookup invoices from SAP.
   - **Unit of Measure**

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

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- **Product Categories**

  Set up subflows for the source configuration to lookup material group details from SAP.



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

5. Configure a scheduled job to synchronize primary data updates from SAP.
6. Set the time 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.

You have configured the ERP source for SAP.

Define ERP source configuration for SAP

ERP source configuration determines the ERP source to which your ERP system connects. Map the integration payload with the SAP 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, which refers to the parent connection for SAP. If there are multiple SAP instances, multiple ERP sources must be configured, and the child connections for these SAP 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 configurations based on your requirement:

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- **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:

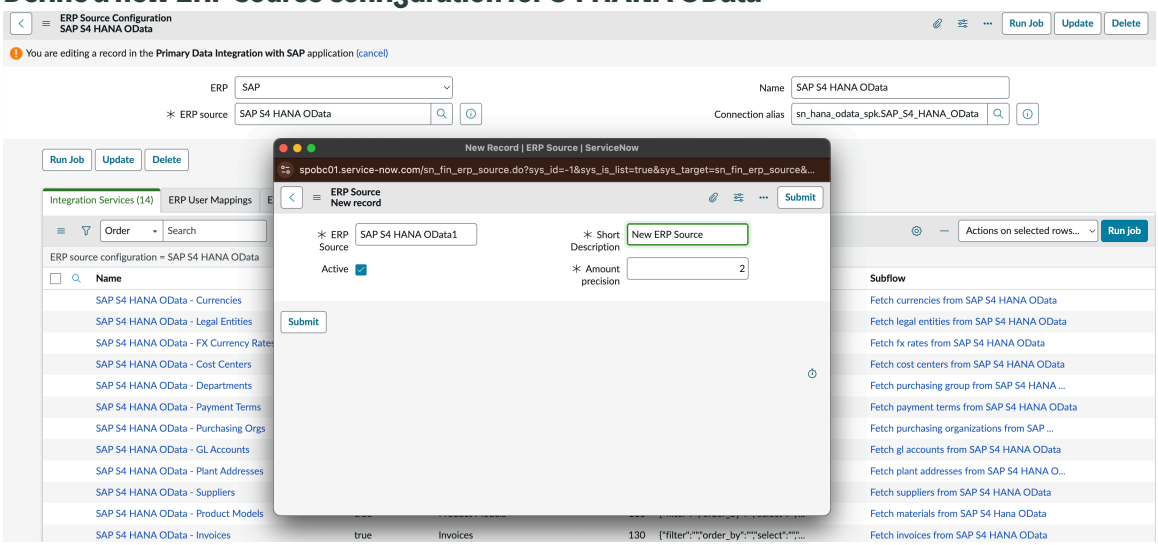
   a. Select **New**.

   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.
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 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.

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What to do next

By default, the SAP base system provides 14 integration services. For other SAP instances, you must 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 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

For configuring integration services, provide the connection end point and the SAP 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.

https://player.vimeo.com/video/1121974947?h=c47e0a87be&badge=0&autopause=0&player_id=0&app_id=58479

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.

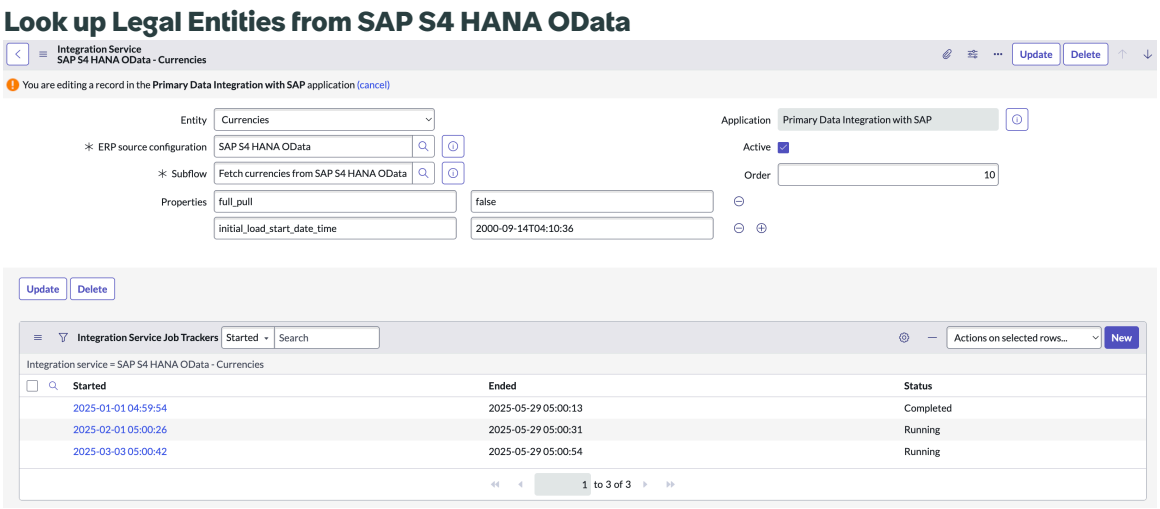
Role required: sn_fcms_intg.admin

About this task

If the application requires multiple SAP 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.



4. To modify the Integration service record, select **here**.

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5. 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. ▪ 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.

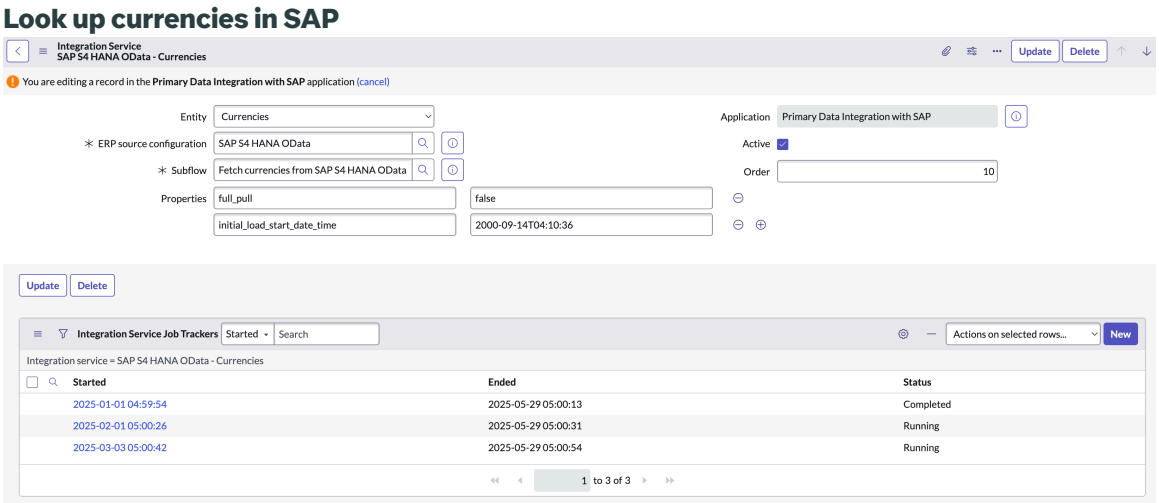
6. Select **Update** to save the configuration changes.
The integration service is configured for the selected entity.

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Look up primary data in SAP

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.



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
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	Unit of Measure inbound staging table
Product Categories	Product Model Stage inbound staging table

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Transformation maps and subflows

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

Manually execute flows or subflows in SAP (Inbound)

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

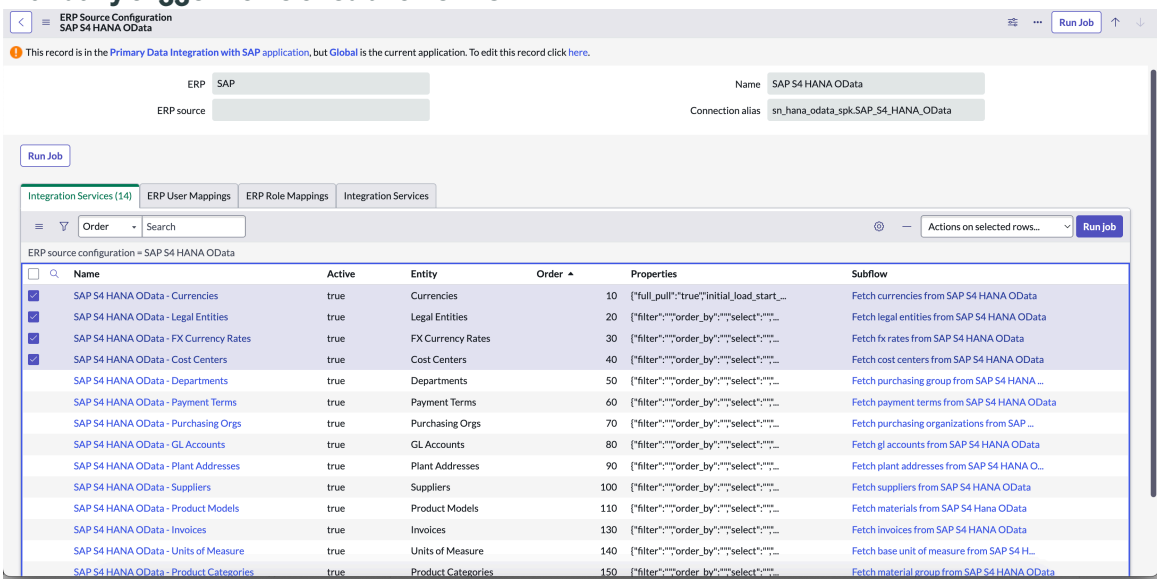
Before you begin

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** ERP source to manually trigger the flows or subflows.
   For example, SAP ECC, or SAP S4 HANA Cloud, or SAP HANA OData
3. In the Integration Services list, select the subflows that you want to manually trigger.

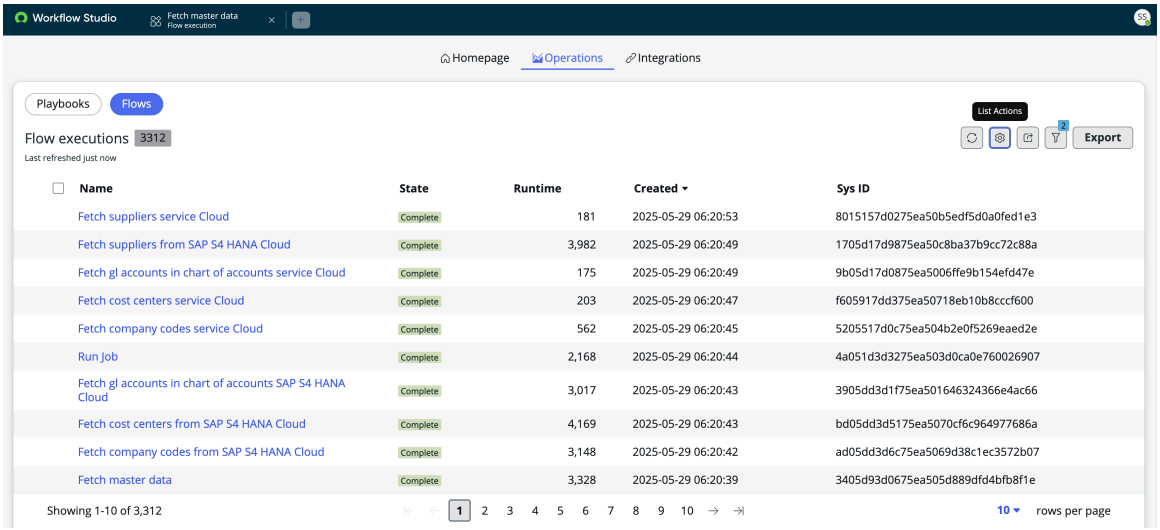
Manually trigger flows or subflows in SAP



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** or **SAP S4 HANA** application name using the filter icon, and select **Apply**.
   You can view the flows or subflows that you triggered.

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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.

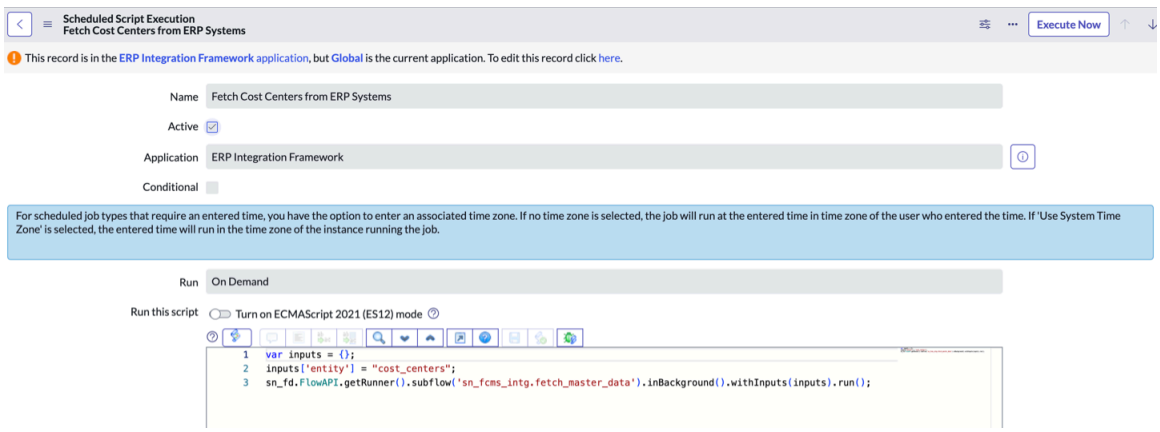
   Note: Don't modify the trigger condition.

   The flow or subflow gets executed.

Scheduled jobs to look up primary data in SAP

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

Before you start the SAP 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.



Run scheduled jobs in SAP

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

Before you begin

Role required: sn_fcms_intg.admin

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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.

Use Source-to-Pay integration with SAP

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

Use schedule flows in SAP

Use the schedule flows that interact with SAP 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.

Important:

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

The Source-to-Pay with SAP integration supports the following subflows.

Primary Data Integration with SAP

The Primary Data Integration with SAP supports the following subflows and system properties:

Subflows for Primary Data Integration with SAP ECC

Scheduled subflow details for Primary Data Integration with SAP ECC

Subflow	Description
Fetch Currencies	Use this subflow to fetch and synchronize all currencies from SAP ECC system.
Fetch Legal Entities	Use this subflow to fetch and synchronize all legal entities from SAP ECC system.
Fetch FX Currency Rates	Use this subflow to fetch and synchronize all FX currency rates from SAP ECC system.
Fetch Cost Centers	Use this subflow to fetch and synchronize all cost centers from SAP ECC system.
Fetch Departments	Use this subflow to fetch and synchronize all departments from SAP ECC.
Fetch Payment Terms	Use this subflow to fetch and synchronize all payment terms from SAP ECC system.

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Scheduled subflow details for Primary Data Integration with SAP ECC (continued)

Subflow	Description
Fetch Purchasing Orgs	Use this subflow to fetch and synchronize all purchasing organizations from SAP ECC system.
Fetch GL Accounts	Use this subflow to fetch and synchronize all GL accounts from SAP ECC system.
Fetch Product Models	Use this subflow to fetch and synchronize all product models from SAP ECC system.
Fetch ServiceNow Product Models	Use this subflow to fetch and synchronize all ServiceNow product models from SAP ECC system.
Fetch Plant Addresses	Use this subflow to fetch plant addresses from SAP ECC system.
Fetch Suppliers	Use this subflow to fetch and synchronize all suppliers from SAP ECC system.

System Properties for Primary Data Integration with SAP ECC

Use these system properties to configure settings for the Primary Data Integration with SAP ECC from the System Properties page. For more information, see Source-to-Pay integrations with SAP reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Primary Data Integration with SAP ECC

Property Name	Description
sn_sap_data_int.cloud_base_unit_of_measure_service_subflow	Use this subflow for fetching the base units of measure from SAP ECC system.
sn_sap_data_int.cloud_company_codes_service_subflow	Use this subflow for fetching company codes from SAP ECC system.
sn_sap_data_int.cloud_cost_centers_service_subflow	Use this subflow for fetching cost center data from SAP ECC system.
sn_sap_data_int.cloud_fetch_suppliers_service_subflow	Use this subflow for fetching supplier details from SAP ECC system.
sn_sap_data_int.cloud_materials_service_subflow	Use this subflow for fetching material data from SAP ECC system.
sn_sap_data_int.cloud_material_group_service_subflow	Use this subflow for fetching material group information from SAP ECC system.
sn_sap_data_int.full_load_time_range_default	Defines the default time range for full data loads.
sn_sap_data_int.odata_base_unit_of_measure_service_subflow	Use this subflow for fetching base unit of measure data using OData service.

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System Properties for Primary Data Integration with SAP ECC (continued)

Property Name	Description
sn_sap_data_int.odata_cost_centers_service_subflow	Use this subflow for fetching cost center details using OData service.
sn_sap_data_int.odata_currencies_service_subflow	Use this subflow for syncing currency information using OData service.
sn_sap_data_int.odata_fx_rate_service_subflow	Use this subflow for fetching foreign exchange rates using OData service.
sn_sap_data_int.odata_gl_account_service_subflow	Use this subflow for fetching general ledger account data using OData service.
sn_sap_data_int.odata_legal_entities_service_subflow	Use this subflow for fetching legal entity details using OData service.
sn_sap_data_int.odata_materials_service_subflow	Use this subflow for fetching materials data using OData service.
sn_sap_data_int.odata_material_group_service_subflow	Use this subflow for fetching material group details using OData service.
sn_sap_data_int.odata_payment_terms_service_subflow	Use this subflow for fetching payment terms information using OData service.
sn_sap_data_int.odata_plant_addresses_service_subflow	Use this subflow for retrieving plant address details using OData service.
sn_sap_data_int.odata_purchasing_group_service_subflow	Use this subflow for fetching purchasing group data using OData service.
sn_sap_data_int.odata_purchasing_organizations_service_subflow	Use this subflow for fetching purchasing organization details using OData service.
sn_sap_data_int.odata_suppliers_service_subflow	Use this subflow for fetching supplier information through OData service.
sn_sap_data_int.Subflow.Resume.Count	Track the number of times a subflow resumes execution. Default value: 30
sn_sap_data_int.subflow_timeout_value	Maximum timeout duration (in milliseconds) for subflow execution. Default value: 10000000

Subflows for Primary Data Integration with SAP S4 HANA Cloud

Scheduled subflow details for Primary Data Integration with SAP S4 HANA Cloud

Subflow	Description
Fetch Legal Entities	Use this subflow to fetch and synchronize all legal entities from SAP S4 HANA Cloud system.

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Scheduled subflow details for Primary Data Integration with SAP S4 HANA Cloud (continued)

Subflow	Description
Fetch Cost Centers	Use this subflow to fetch and synchronize all cost centers from SAP S4 HANA Cloud system.
Fetch GL Accounts	Use this subflow to fetch and synchronize all GL accounts from SAP S4 HANA Cloud system.
Fetch Suppliers	Use this subflow to fetch and synchronize all supplier details from SAP S4 HANA Cloud system.
Fetch Product Models	Use this subflow to fetch and synchronize all product models from SAP S4 HANA Cloud system.
Fetch Units of Measure	Use this subflow to fetch base unit of measure from SAP S4 HANA Cloud system.
Fetch Product Categories	Use this subflow to fetch and synchronize all product categories from SAP S4 HANA Cloud system.

System Properties for Primary Data Integration with SAP S4 HANA Cloud

Use these system properties to configure settings for the Primary Data Integration with SAP S4 HANA Cloud from the System Properties page. For more information, see Source-to-Pay integrations with SAP reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Primary Data Integration with SAP S4 HANA Cloud

Property Name	Description
sn_sap_data_int.cloud_base_unit_of_measure_service_subflow	Use this subflow for fetching the base units of measure from SAP S4 HANA Cloud system.
sn_sap_data_int.cloud_company_codes_service_subflow	Use this subflow for fetching company codes from SAP S4 HANA Cloud system.
sn_sap_data_int.cloud_cost_centers_service_subflow	Use this subflow for fetching cost center data from SAP S4 HANA Cloud system.
sn_sap_data_int.cloud_fetch_suppliers_service_subflow	Use this subflow for fetching supplier details from SAP S4 HANA Cloud system.
sn_sap_data_int.cloud_materials_service_subflow	Use this subflow for fetching material data from SAP S4 HANA Cloud system.
sn_sap_data_int.cloud_material_group_service_subflow	Use this subflow for fetching material group information from SAP S4 HANA Cloud system.

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System Properties for Primary Data Integration with SAP S4 HANA Cloud (continued)

Property Name	Description
sn_sap_data_int.full_load_time_range_default	Defines the default time range for full data loads.
sn_sap_data_int.odata_base_unit_of_measure_service_subflow	Use this subflow for fetching base unit of measure data using OData service.
sn_sap_data_int.odata_cost_centers_service_subflow	Use this subflow for fetching cost center details using OData service.
sn_sap_data_int.odata_currencies_service_subflow	Use this subflow for syncing currency information using OData service.
sn_sap_data_int.odata_fx_rate_service_subflow	Use this subflow for fetching foreign exchange rates using OData service.
sn_sap_data_int.odata_gl_account_service_subflow	Use this subflow for fetching general ledger account data using OData service.
sn_sap_data_int.odata_legal_entities_service_subflow	Use this subflow for fetching legal entity details using OData service.
sn_sap_data_int.odata_materials_service_subflow	Use this subflow for fetching materials data using OData service.
sn_sap_data_int.odata_material_group_service_subflow	Use this subflow for fetching material group details using OData service.
sn_sap_data_int.odata_payment_terms_service_subflow	Use this subflow for fetching payment terms information using OData service.
sn_sap_data_int.odata_plant_addresses_service_subflow	Use this subflow for retrieving plant address details using OData service.
sn_sap_data_int.odata_purchasing_group_service_subflow	Use this subflow for fetching purchasing group data using OData service.
sn_sap_data_int.odata_purchasing_organizations_service_subflow	Use this subflow for fetching purchasing organization details using OData service.
sn_sap_data_int.odata_suppliers_service_subflow	Use this subflow for fetching supplier information through OData service.
sn_sap_data_int.Subflow.Resume.Count	Track the number of times a subflow resumes execution. Default value: 30
sn_sap_data_int.subflow_timeout_value	Maximum timeout duration (in milliseconds) for subflow execution. Default value: 10000000

Subflows for Primary Data Integration with SAP S4 HANA OData

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Scheduled subflow details for Primary Data Integration with SAP S4 HANA OData

Subflow	Description
Fetch Currencies	Use this subflow to fetch and synchronize all Currencies from SAP S4 HANA OData system.
Fetch Legal Entities	Use this subflow to fetch and synchronize all legal entities from SAP S4 HANA OData system.
Fetch FX Currency Rates	Use this subflow to fetch and synchronize all FX rates from SAP S4 HANA OData system.
Fetch Cost Centers	Use this subflow to fetch and synchronize all cost centers from SAP S4 HANA OData system.
Fetch Departments	Use this subflow to fetch and synchronize all departments from SAP S4 HANA OData system.
Fetch Payment Terms	Use this subflow to fetch and synchronize all payment terms from SAP S4 HANA OData system.
Fetch Purchasing Orgs	Use this subflow to fetch and synchronize all Purchasing Organizations from SAP S4 HANA OData system.
Fetch GL Accounts	Use this subflow to fetch and synchronize all GL accounts from SAP S4 HANA OData system.
Fetch Plant Addresses	Use this subflow to Fetch Plant Addresses from SAP S4 HANA OData system.
Fetch Suppliers	Use this subflow to fetch and synchronize all supplier details from SAP S4 HANA OData system.
Fetch Product Models	Use this subflow to fetch and synchronize all product models from SAP S4 HANA Cloud system.
Fetch Units of Measure	Use this subflow to fetch base unit of measure from SAP S4 HANA Cloud system.
Fetch Product Categories	Use this subflow to fetch and synchronize all product categories from SAP S4 HANA Cloud system.

System Properties for Primary Data Integration with SAP S4 HANA OData

Use these system properties to configure settings for the Primary Data Integration with SAP S4 HANA OData from the System Properties page. For more information, see Source-to-Pay integrations with SAP reference.

Role required:

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- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Primary Data Integration with SAP S4 HANA OData

Property Name	Description
sn_sap_data_int.cloud_base_unit_of_measure_service_subflow	Use this subflow for fetching the base units of measure from SAP S4 HANA OData system.
sn_sap_data_int.cloud_company_codes_service_subflow	Use this subflow for fetching company codes from SAP S4 HANA OData system.
sn_sap_data_int.cloud_cost_centers_service_subflow	Use this subflow for fetching cost center data from SAP S4 HANA OData system.
sn_sap_data_int.cloud_fetch_suppliers_service_subflow	Use this subflow for fetching supplier details from SAP S4 HANA OData system.
sn_sap_data_int.cloud_materials_service_subflow	Use this subflow for fetching material data from SAP S4 HANA OData system.
sn_sap_data_int.cloud_material_group_service_subflow	Use this subflow for fetching material group information from SAP S4 HANA OData system.
sn_sap_data_int.full_load_time_range_default	Defines the default time range for full data loads.
sn_sap_data_int.odata_base_unit_of_measure_service_subflow	Use this subflow for fetching base unit of measure data using OData service.
sn_sap_data_int.odata_cost_centers_service_subflow	Use this subflow for fetching cost center details using OData service.
sn_sap_data_int.odata_currencies_service_subflow	Use this subflow for syncing currency information using OData service.
sn_sap_data_int.odata_fx_rate_service_subflow	Use this subflow for fetching foreign exchange rates using OData service.
sn_sap_data_int.odata_gl_account_service_subflow	Use this subflow for fetching general ledger account data using OData service.
sn_sap_data_int.odata_legal_entities_service_subflow	Use this subflow for fetching legal entity details using OData service.
sn_sap_data_int.odata_materials_service_subflow	Use this subflow for fetching materials data using OData service.
sn_sap_data_int.odata_material_group_service_subflow	Use this subflow for fetching material group details using OData service.
sn_sap_data_int.odata_payment_terms_service_subflow	Use this subflow for fetching payment terms information using OData service.
sn_sap_data_int.odata_plant_addresses_service_subflow	Use this subflow for retrieving plant address details using OData service.
sn_sap_data_int.odata_purchasing_group_service_subflow	Use this subflow for fetching purchasing group data using OData service.
sn_sap_data_int.odata_purchasing_organization_service_subflow	Use this subflow for fetching purchasing organization details using OData service.

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System Properties for Primary Data Integration with SAP S4 HANA OData (continued)

Property Name	Description
sn_sap_data_int.odata_suppliers_service_subflow	Use this subflow for fetching supplier information through OData service.
sn_sap_data_int.Subflow.Resume.Count	Track the number of times a subflow resumes execution. Default value: 30
sn_sap_data_int.subflow_timeout_value	Maximum timeout duration (in milliseconds) for subflow execution. Default value: 10000000

Supplier Lifecycle Operations Integration with SAP

The Supplier Lifecycle Operations Integration with SAP supports the following subflows:

Subflows for Supplier Lifecycle Operations Integration with SAP ECC

Scheduled subflow details for Supplier Lifecycle Operations Integration with SAP ECC

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

Subflows for Supplier Lifecycle Operations Integration with SAP S4 HANA OData

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

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

Sourcing and Procurement Operations Integration with SAP

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

Subflows for Sourcing and Procurement Operations Integration with SAP ECC

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

Flow	Description
Create or update Purchase Order	Creates or updates purchase orders in SAP ECC.
Create Goods Receipts	Creates goods receipts in SAP ECC.
Cancel Goods Receipts	Cancels goods receipts in SAP ECC.
Fetch Purchase Order	Fetches and synchronize all purchase orders from SAP ECC.
Fetch Goods Receipts	Fetches and synchronize all goods receipts from SAP ECC.

Subflows for Sourcing and Procurement Operations Integration with SAP S4 HANA OData

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

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

Flow	Description
Create or update Purchase Order	Creates or updates purchase orders in SAP S4 HANA OData.
Create Goods Receipts	Creates goods receipts in SAP S4 HANA OData.
Cancel Goods Receipts	Cancels goods receipts in SAP S4 HANA OData.
Fetch Purchase Order	Fetches and synchronize all purchase orders from SAP S4 HANA OData system.
Fetch Goods Receipts	Fetches and synchronize all goods receipts from SAP S4 HANA OData system.

System Properties for Sourcing and Procurement Operations Integration with SAP

Use these system properties to configure settings for the Sourcing and Procurement Operations Integration with SAP from the System Properties page. For more information, see Source-to-Pay integrations with SAP reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

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System Properties for Sourcing and Procurement Operations Integration with SAP

Property Name	Description
sn_psm_sap_int.should_transactions_flow_through_idocs	Indicates whether procurement transactions should be processed through SAP IDoc integration.
sn_psm_sap_int.status_for_goods_receipt	Current status of goods receipt in the procurement process.
sn_psm_sap_int.status_for_purchase_order	Current status of a purchase order within the SAP-integrated procurement workflow

Accounts Payable Operations Integration with SAP

The Accounts Payable Operations Integration with SAP supports the following subflows:

Accounts Payable Operations Integration with SAP ECC

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

Scheduled subflow details for Accounts Payable Operations Integration with SAP ECC

Flow	Description
Create Invoice	Creates invoices in SAP ECC.
Create Non-Purchase Order Invoice	Creates non-purchase order Invoices in SAP ECC.
Cancel Invoice	Cancels invoices in SAP ECC.
Authorize Payment	Authorizes and releases payment for supplier invoice in SAP ECC.
Fetch Invoice	Fetches and synchronize all invoices from the SAP ECC system.

Accounts Payable Operations Integration with SAP S4 HANA OData

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

Flow	Description
Create Invoice	Creates invoices in SAP S4 HANA OData.
Create Non-Purchase Order Invoice	Create non-purchase order Invoices in SAP S4 HANA OData.
Cancel Invoice	Cancels invoices in SAP S4 HANA OData.
Authorize Payment	Authorizes and releases payment for supplier invoice in SAP S4 HANA OData.

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Scheduled subflow details for Accounts Payable Operations Integration with SAP S4 HANA OData (continued)

Flow	Description
Fetch Invoice	Fetches and synchronize all invoices from the SAP S4 HANA OData system.

System Properties for Accounts Payable Operations Integration with SAP

Use these system properties to configure settings for the Accounts Payable Operations Integration with SAP from the System Properties page. For more information, see Source-to-Pay integrations with SAP reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Accounts Payable Operations Integration with SAP

Property Name	Description
sn_apm_sap_int.cloud_invoices_service_subflow	Specifies the subflow used to fetch invoice data from the Cloud-based SAP service.
sn_apm_sap_int.odata_invoices_service_subflow	Defines the subflow responsible for fetching invoices via SAP OData services.

Use a flow or subflow in SAP (Outbound)

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

Before you begin

Role required:

- sn_fcms_intg.admin - Write role
- sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin - Read role

About this task

https://player.vimeo.com/video/1121974926?h=1751b72860&badge=0&autopause=0&player_id=0&app_id=58479

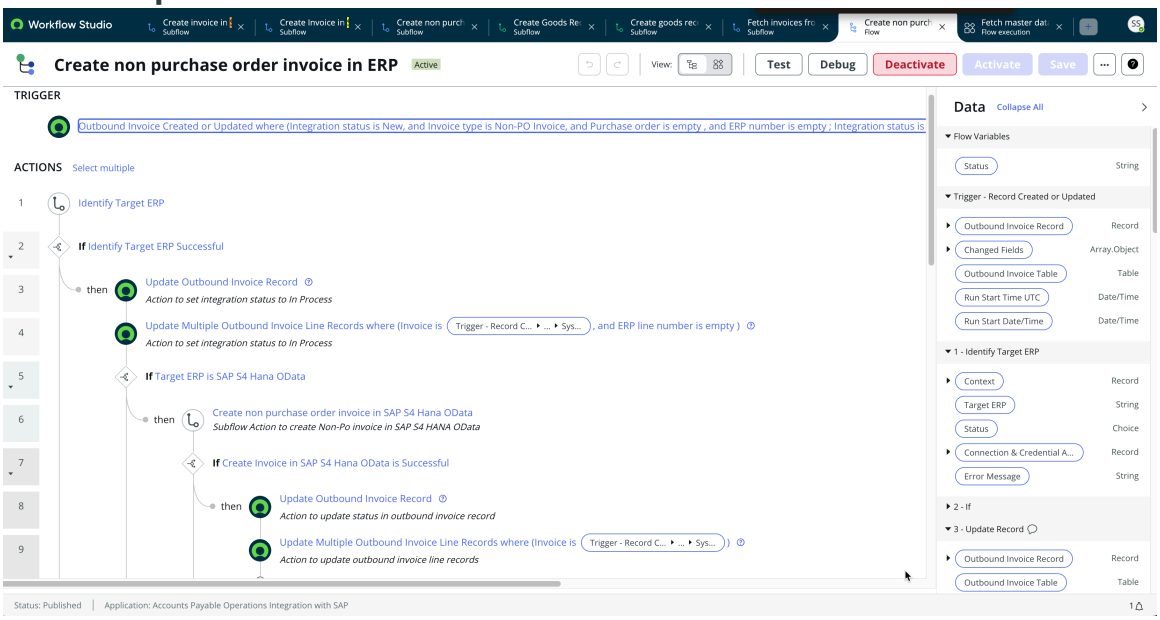
Procedure

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** application name using the filter icon, and select **Apply**.
   For example, SAP ECC, or SAP S4 HANA Cloud, or SAP HANA OData
4. Select the required flow from the list.

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

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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

You can create a copy of the 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.admin - Write role
- sn_fcms_intg.admin - Read role
- sn_shop.procurement_specialist, sn_shop.shopper - Users

About this task

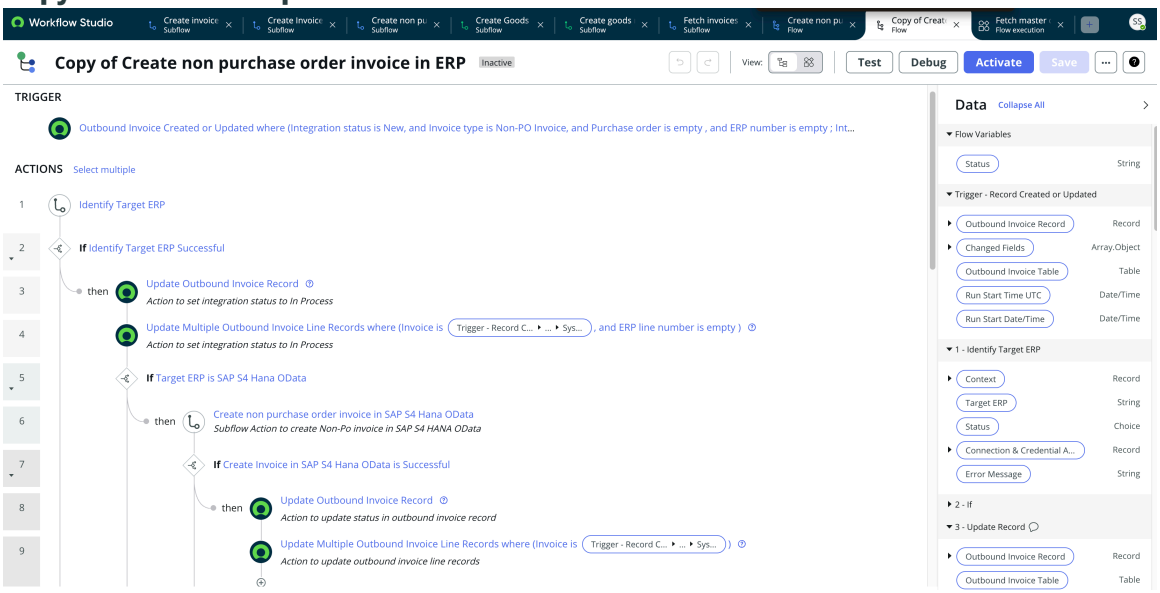
Procedure

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 **More actions**, and select **Copy flow**.

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

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Copy of a Create non-purchase order flow



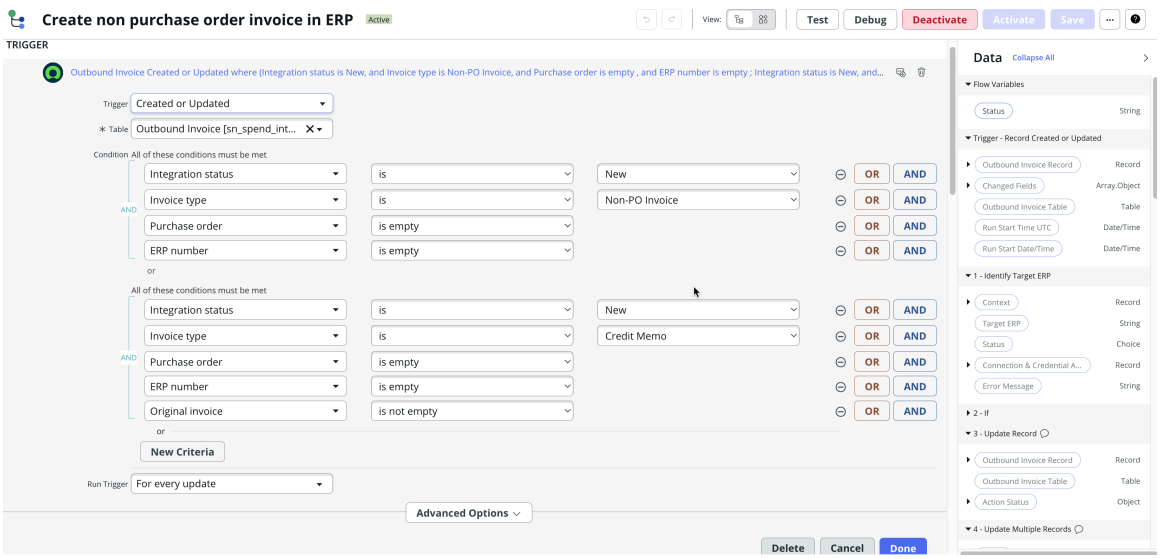
5. Activate the flow or subflow.
   - Make sure that the flow or subflow is available and activated on the base system.
   - Activate the copied flow after making the required changes.
6. Use the **Trigger Condition** for the flow or subflow.

   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: Don't modify the trigger condition.

Trigger conditions for Creating a non-purchase order invoice flow



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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.

You have successfully copied and executed the flow.

Source-to-Pay integrations with SAP reference

Reference topics provide additional information on integrating Source-to-Pay Operations with SAP integrations, including primary data, fixed assets, purchase orders, receipts, invoices, and tax integration between Source-to-Pay and ERP systems.

Set system properties for SAP Integrations

Use these system properties to configure settings for the SAP ECC, S4 HANA Cloud, and S4 HANA OData integrations from the System Properties page.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

To access the system properties list, perform the following steps:

1. Navigate to **All**.
2. Search for `sys_properties_list.do` and open the system properties list.
3. Look up Primary Data Integration with SAP using the filter option.
4. The following system properties are available as a part of the base system.

Note: You can modify these values only if necessary.

Source-to-Pay Integration with 3CLogic

Integrating Source-to-Pay Operations with 3CLogic provides omnichannel 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 an omnichannel 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.

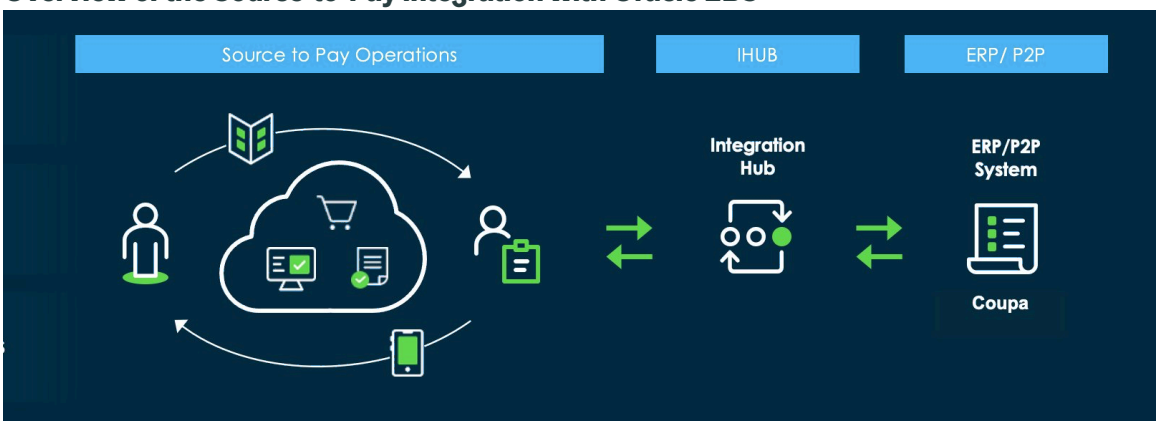
Key features

With this application, you can perform the following:

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- 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.

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



Prerequisites

First, you must activate the Source-to-Pay integration with the 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 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.

Configure 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:

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- 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.

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

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Sourcing and Procurement Operations Integration with Oracle EBS (continued)

App name	Plugin ID
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.

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'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.

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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.
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**

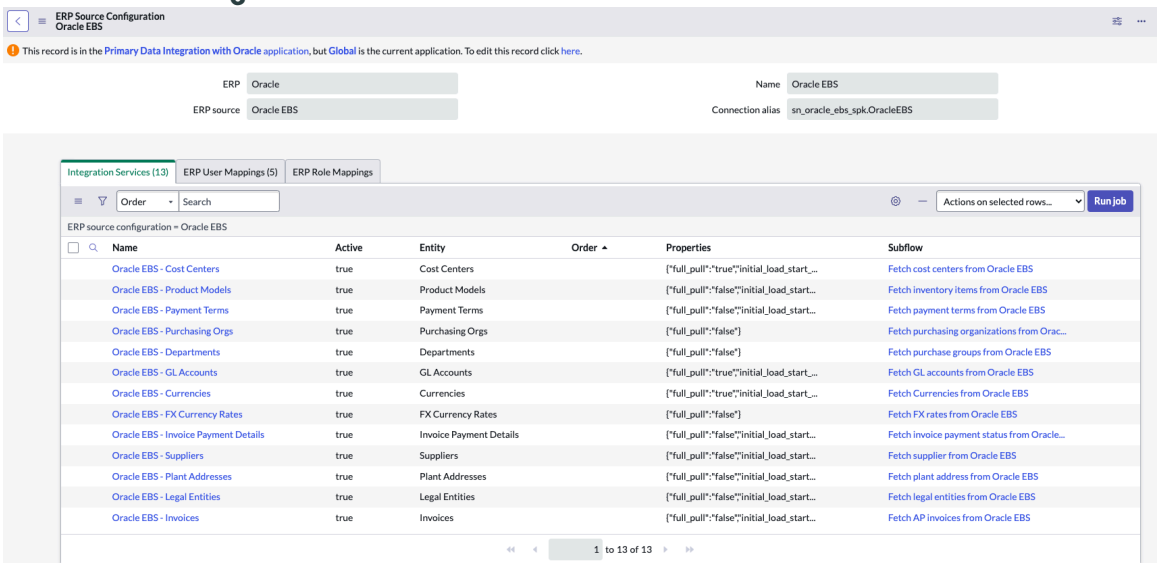
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Set up subflows for the source configuration to lookup legal entities or company code details from Oracle EBS.

- **Invoices**

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

ERP Source Configuration of Oracle EBS



6. Configure a 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.

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

8. Load data to the 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.

   You have configured the ERP source for Oracle EBS.

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.

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

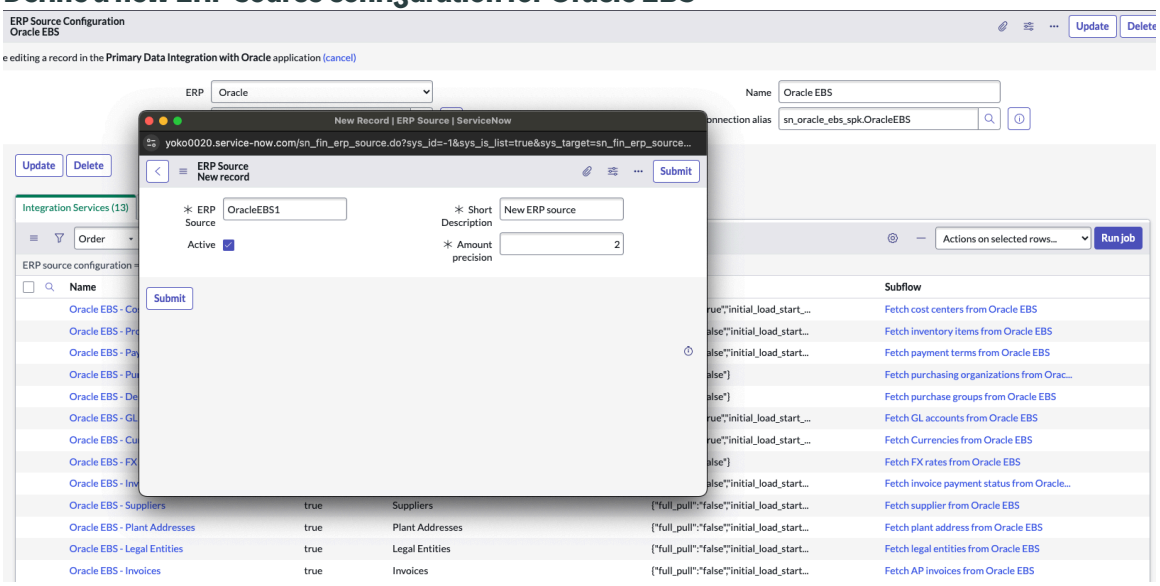
   a. Select **New**.

   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**.

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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 service mappings. 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.

Configure integration services for Oracle EBS

For configuring integration services, 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

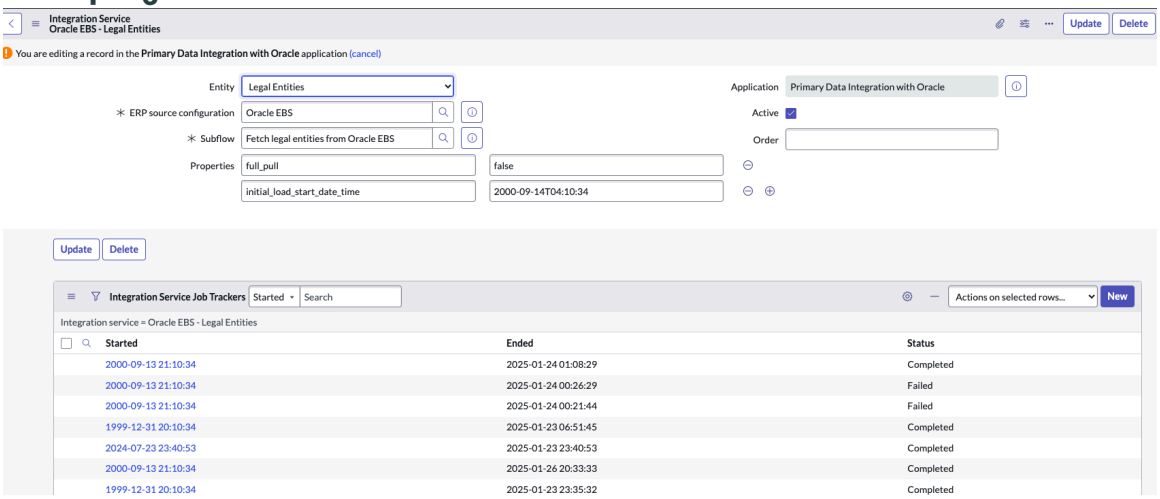
If the application requires multiple Oracle EBS ERP instances, create separate web services for each ERP instance. You can create Integration Service records for entities using the `sn_fcms_intg_service` table.

Procedure

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

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Look up Legal Entities from Oracle EBS



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 services.
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.

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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 `2025-02-15T04:10:34`. ○ **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**.
   The integration service is configured for the selected entity.

Load data to ERP user-mapping table for Oracle EBS

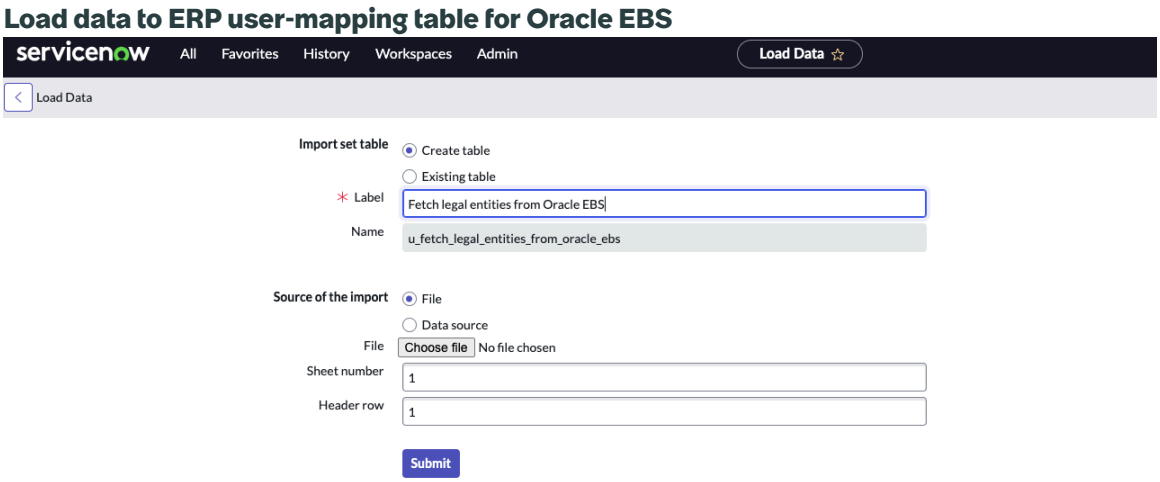
Set up Oracle EBS and ERP User ID mapping for the integration to work. The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule.

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 the **File** option.
4. Select **Choose File** to import the source Excel spreadsheet.



5. **Optional:** If appropriate, specify the Work sheet and Header row number.
6. Select **Submit**.
   The imported data is now available in the new Import Set table.

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7. 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.
8. Transform the data from the import set table to the target table.
   For more information, see Run an import.
   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**.

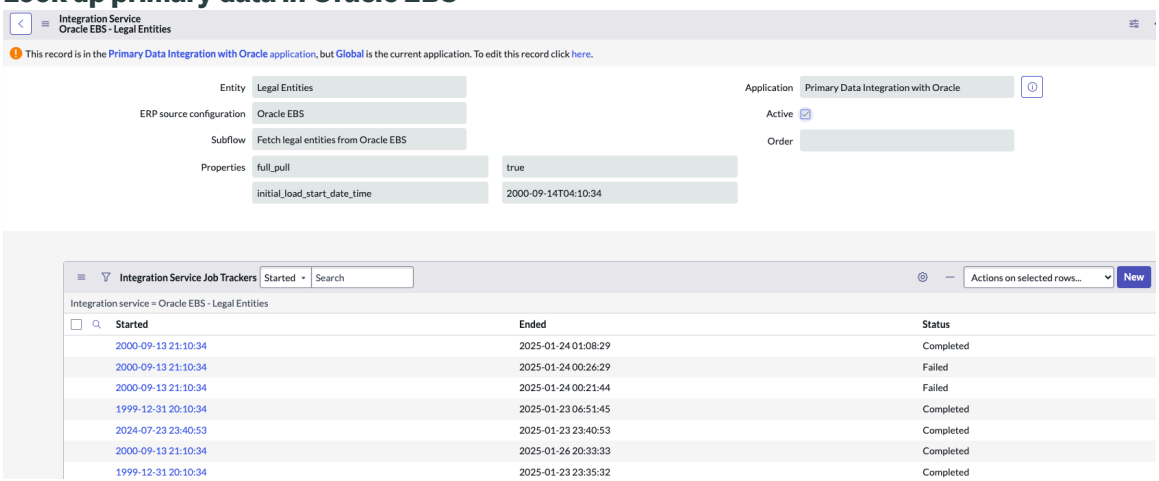
Note: If an ERP user mapping isn't required, you can deactivate it. To deactivate a mapping, in the ERP User Mapping form, select the **Inactive** check box.

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

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Look up primary data in Oracle EBS (continued)

Entity	Description	Table name
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
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.

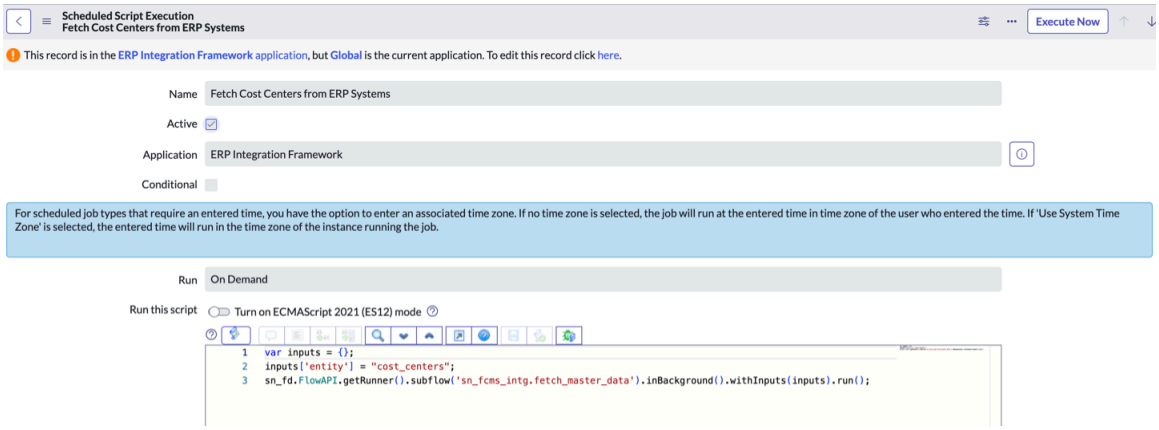
Scheduled jobs to look up primary data in Oracle EBS

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 an 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 a subflow, which is associated with an entity as shown in the following figure. The subflow queries the active entities or ERP source configuration (optional) listed in the integration service table.

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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.

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.

Use Source-to-Pay integration with Oracle EBS

Learn 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.

Important:

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

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

Primary Data Integration with Oracle

The Primary Data Integration with Oracle supports the following subflows and system properties:

Subflows for Primary Data Integration with Oracle

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Scheduled subflow details for Primary Data Integration with Oracle

Subflow	Description
Fetch Cost Centers	Use this subflow to lookup cost centers from Oracle EBS.
Fetch Product Models	Use this subflow to lookup product models from Oracle EBS.
Fetch Payment Terms	Use this subflow to lookup payment terms from Oracle EBS.
Fetch Purchasing Orgs	Use this subflow to lookup purchasing orgs from Oracle EBS.
Fetch Departments	Use this subflow to lookup departments from Oracle EBS.
Fetch GL Accounts	Use this subflow to lookup GL accounts from Oracle EBS.
Fetch Currencies	Use this subflow to lookup currencies from Oracle EBS.
Fetch FX Currency Rates	Use this subflow to lookup FX rates from Oracle EBS.
Fetch Invoice Payment Details	Use this subflow to lookup invoice payment details from Oracle EBS.
Fetch Suppliers	Use this subflow to lookup suppliers from Oracle EBS.
Fetch Plant Addresses	Use this subflow to lookup plant addresses from Oracle EBS.
Fetch Legal Entities	Use this subflow to lookup legal entities or company code details from Oracle EBS.
Fetch Invoices	Use this subflow to lookup invoices from Oracle EBS.

System Properties for Primary Data Integration with Oracle

Use these system properties to configure settings for the Primary Data Integration with Oracle from the System Properties page. For more information, see Source-to-Pay integrations with Oracle reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Primary Data Integration with Oracle

Property Name	Description
sn_orcl_data_int.action_default_page_size	Oracle EBS action's default page size.
sn_orcl_data_int.common_object_details_service_flow_name	Use this subflow to look up common object details in Oracle.

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System Properties for Primary Data Integration with Oracle (continued)

Property Name	Description
sn_orcl_data_int.cost_centers_service_flow_name	Use this subflow for fetching cost centers from the Oracle system.
sn_orcl_data_int.currencies_service_flow_name	Use this subflow for fetching currencies from Oracle EBS system.
sn_orcl_data_int.fetch_purchasing_organizations_service_flow_name	Use this subflow for fetching purchasing organizations from the Oracle system.
sn_orcl_data_int.full_load_time_range_default	Defines the default time range for full data loads.
sn_orcl_data_int.fx_rates_service_flow_name	Use this subflow for fetching FX rates from the Oracle system.
sn_orcl_data_int.glide.rest.max_content_length	Defines the maximum content length allowed for REST API payloads.
sn_orcl_data_int.gl_account_service_flow_name	Use this subflow for fetching GL accounts from the Oracle system.
sn_orcl_data_int.inventory_items_flow_name	Use this subflow for fetching inventory items from the Oracle system.
sn_orcl_data_int.legal_entities_service_flow_name	Use this subflow for fetching legal entities from the Oracle system.
sn_orcl_data_int.payment_terms_service_flow_name	Use this subflow for fetching payment terms from the Oracle system.
sn_orcl_data_int.plant_address_flow_name	Use this subflow for fetching plant address from the Oracle system.
sn_orcl_data_int.purchase_groups_service_flow_name	Use this subflow for fetching purchase groups from the Oracle system.
sn_orcl_data_int.supplier_service_flow_name	Use this subflow for fetching suppliers from the Oracle system.
sn_orcl_data_int.timeout_value	Maximum timeout duration (in milliseconds) for subflow execution. Default value: 10000000

Supplier Lifecycle Operations Integration with Oracle

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

Scheduled subflow details for Supplier Lifecycle Operations Integration with Oracle

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.

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Scheduled subflow details for Supplier Lifecycle Operations Integration with Oracle (continued)

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

Important:

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

System Properties for Supplier Lifecycle Operations Integration with Oracle

Use these system properties to configure settings for the Supplier Lifecycle Operations Integration with Oracle from the System Properties page. For more information, see Source-to-Pay integrations with Oracle reference.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

System Properties for Supplier Lifecycle Operations Integration with Oracle

Property Name	Description
sn_slo_orcl_int.supplier_location_service_flow_name	Use this subflow to fetch supplier location data from the Oracle system.
sn_slo_orcl_int.supplier_payment_service_flow_name	Use this subflow to fetch supplier payment information from the Oracle system.
sn_slo_orcl_int.supplier_service_flow_name	Use this subflow to fetch supplier data from the Oracle system.

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:

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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

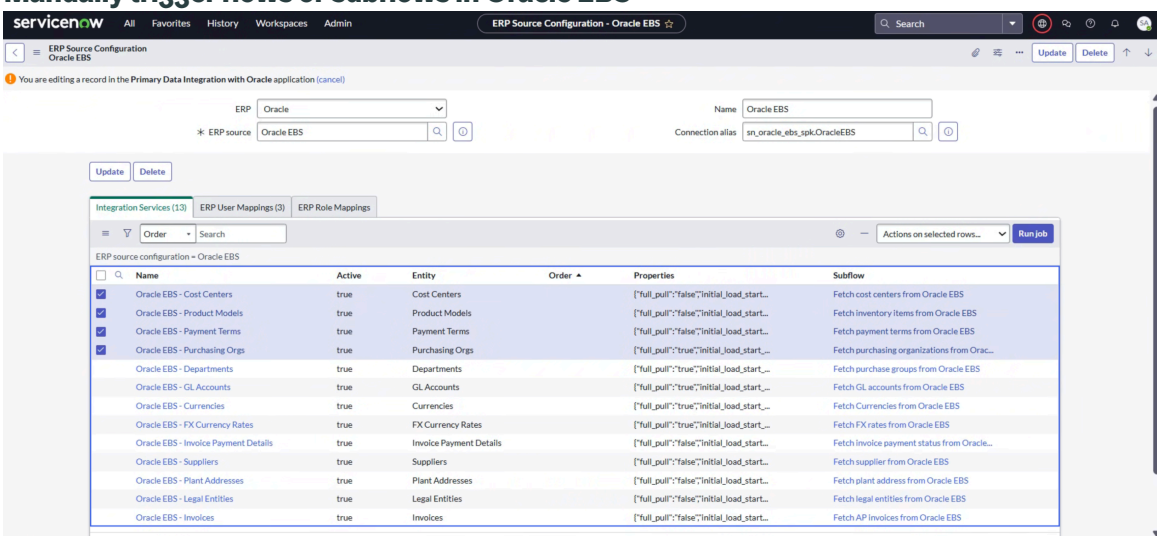
About this task

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.

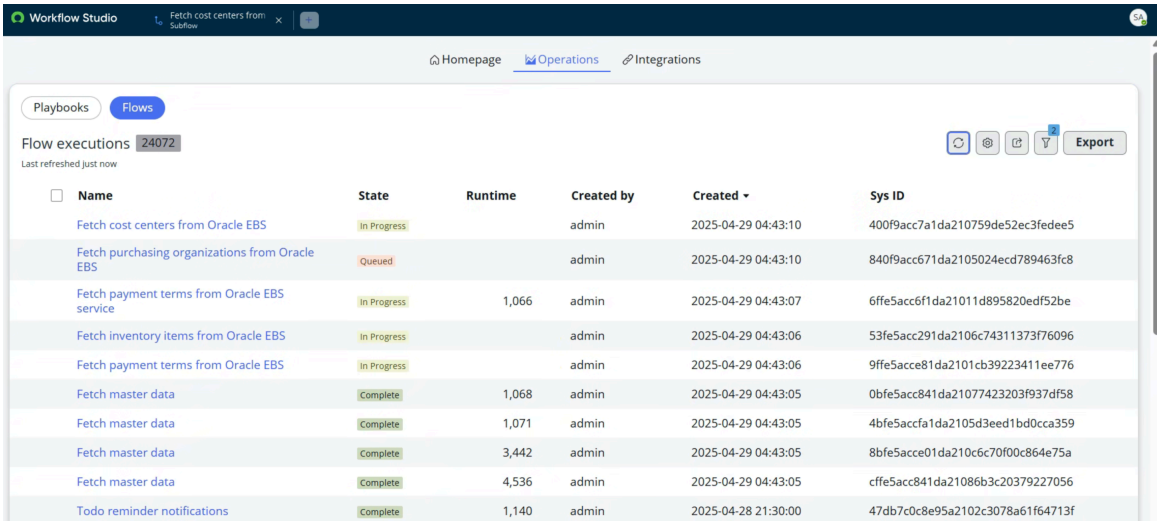
Manually trigger flows or subflows in Oracle EBS



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.

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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.

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

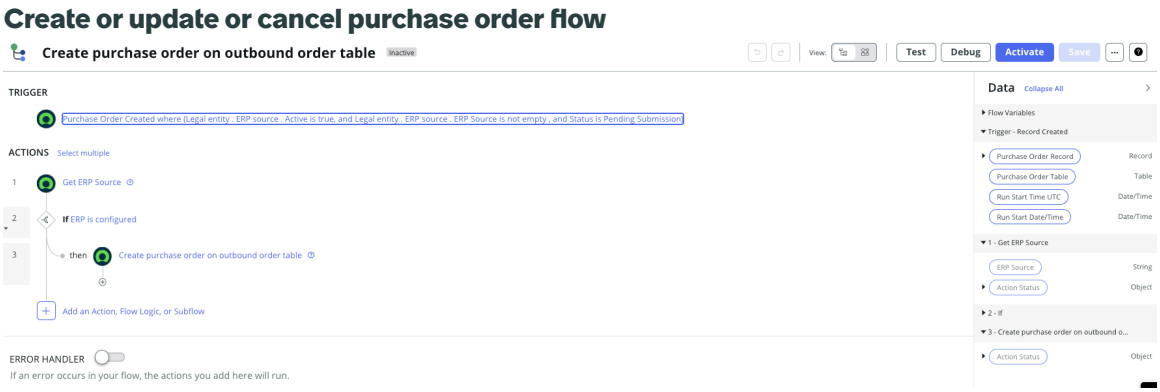
https://player.vimeo.com/video/1121974905?h=c7e9d2124e&badge=0&autopause=0&player_id=0&app_id=58479

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.

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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.

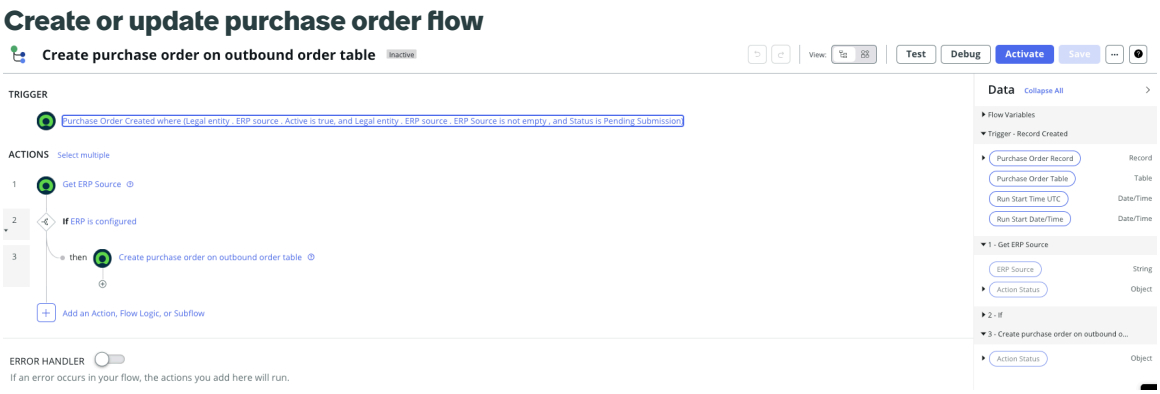
Before you begin

Role required: sn_fcms_intg.integration_user

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. Select **More actions**, 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.

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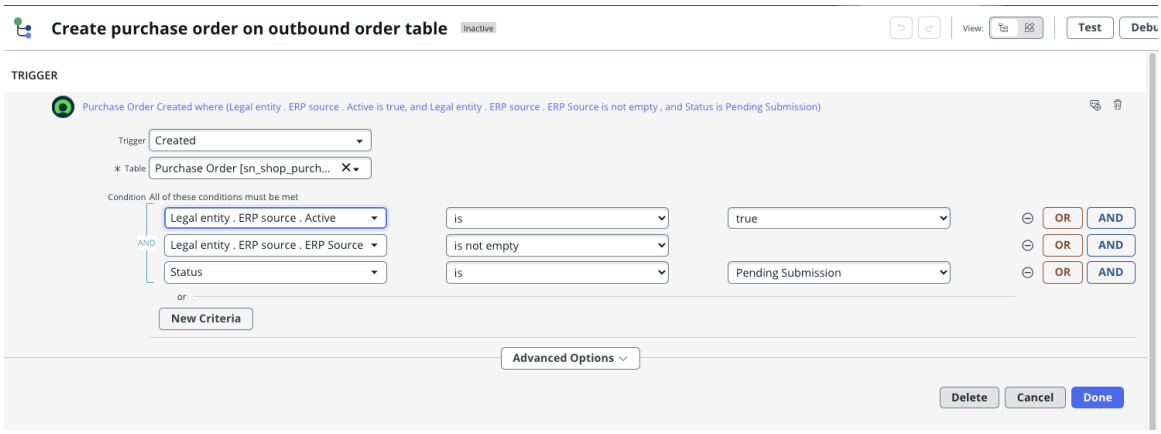
- Make sure that the flow or subflow is available and activated on the base system.
- Activate the copied flow after making the required changes.

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

You have successfully copied and executed the flow.

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:

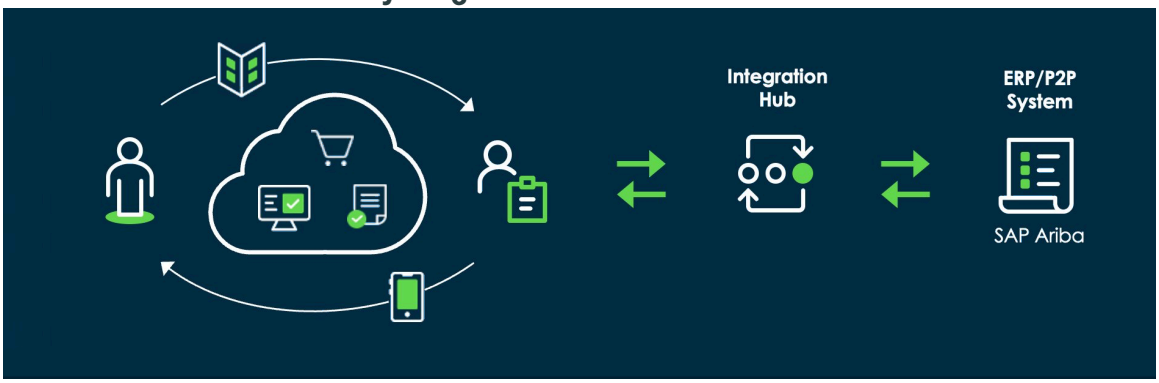
- Integration hub actions for invoices, cost centers, payment terms, purchasing organizations, departments, GL accounts, currencies, FX rates, invoice payment details, suppliers, and legal entities.
- Create goods receipts in SAP Ariba.

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.

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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 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.

Configure 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.

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

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Primary Data Integration with SAP Ariba (continued)

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

Supplier Lifecycle Operations Integration Dependencies with SAP Ariba

Install the following dependencies of Supplier Lifecycle Operations integration with SAP Ariba. When you install the plugin, the dependencies get installed automatically.

Supplier Lifecycle Operations Integration with SAP Ariba

App name	Plugin ID
Primary Data Integration with SAP Ariba	sn_ariba_data_int
Source-to-Pay Integration Framework	sn_spend_intg
Primary Data Integration with SAP Ariba	sn_utility_spoke
Finance Common Architecture	sn_fin
ERP Integration Framework	sn_fcms_intg
Supplier Common Architecture	sn_slm

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

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Accounts Payable Operations Integration with SAP Ariba (continued)

App name	Plugin ID
Source-to-Pay Integration Framework	sn_spend_intg

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:

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- **Legal Entities**

  Set up subflows for the source configuration to lookup legal entities or company code details from SAP Ariba.

- **FX Currency Rates**

  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**

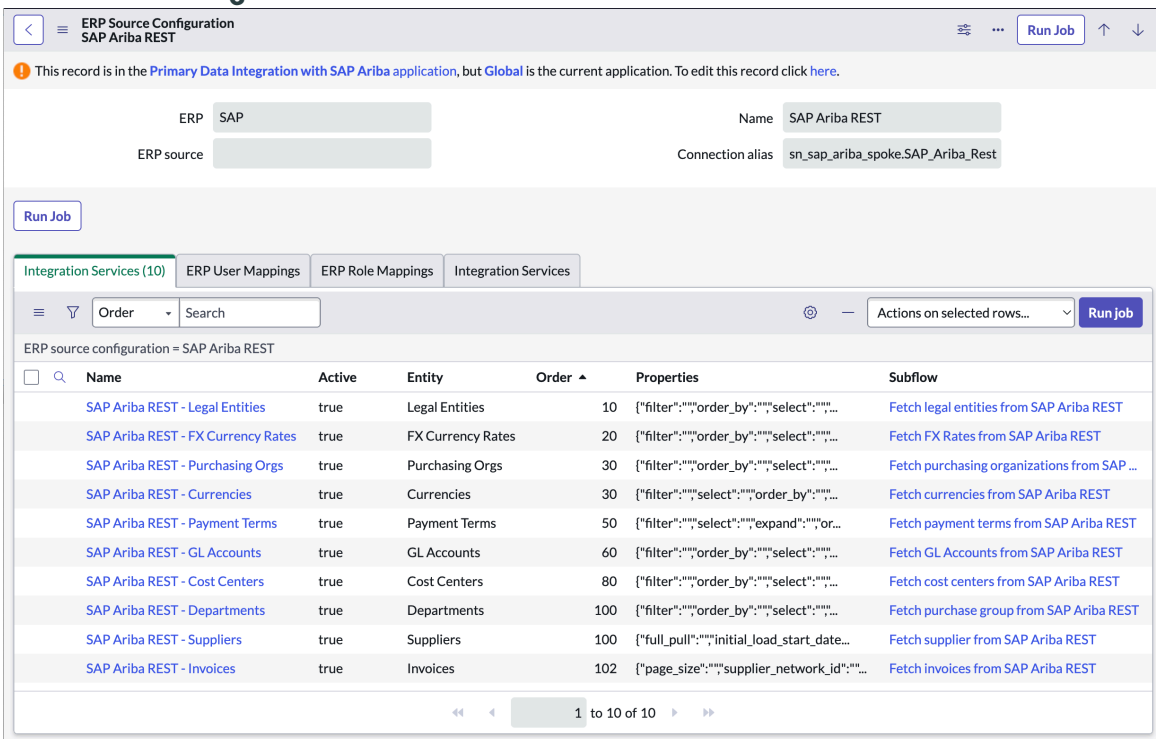
  Set up subflows for the source configuration to lookup suppliers from SAP Ariba

- **Invoices**

  Set up subflows for the source configuration to lookup invoices from SAP Ariba.

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ERP Source Configuration for SAP Ariba



You have configured the ERP source for SAP Ariba.

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

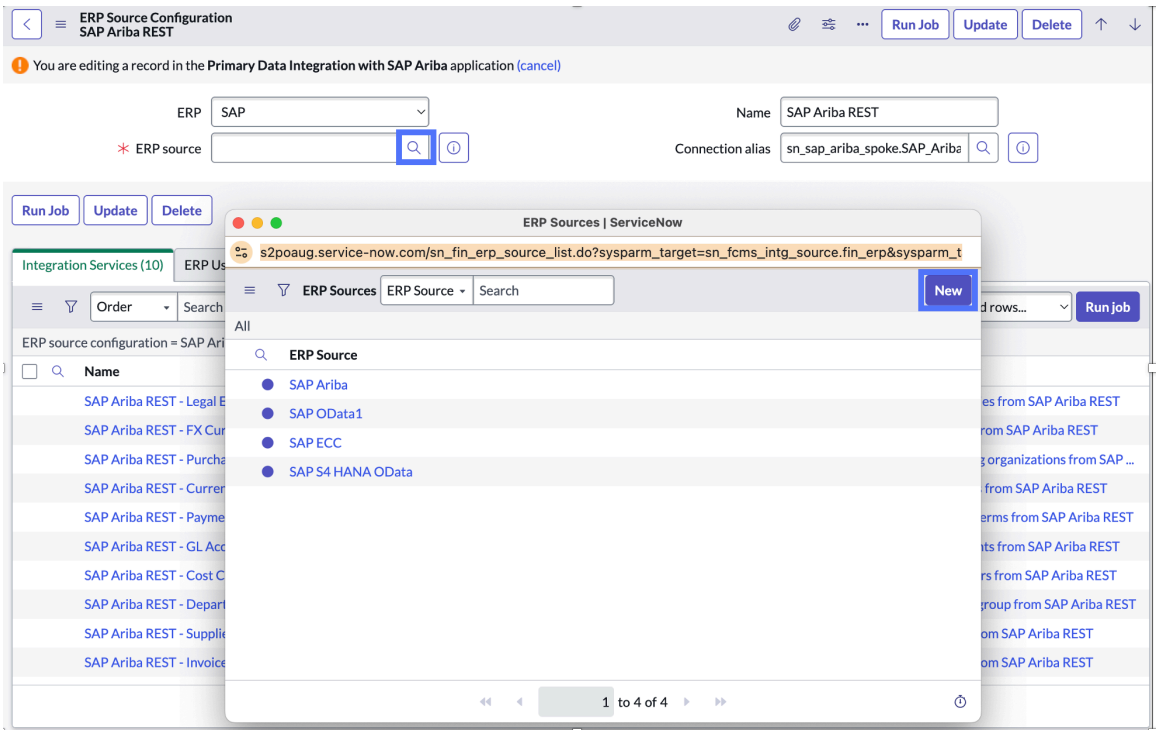
Procedure

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 integration services for SAP Ariba

For configuring integration services, 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 integration services.
   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 integration service.
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 integration service is configured for the selected entity.

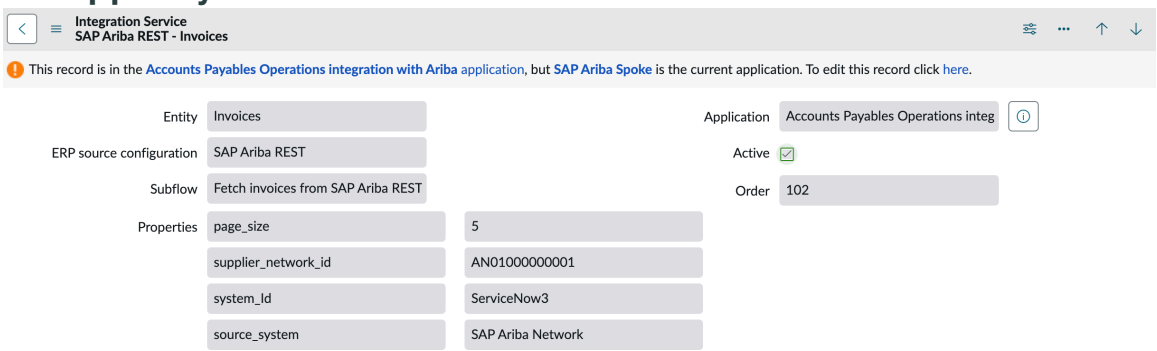
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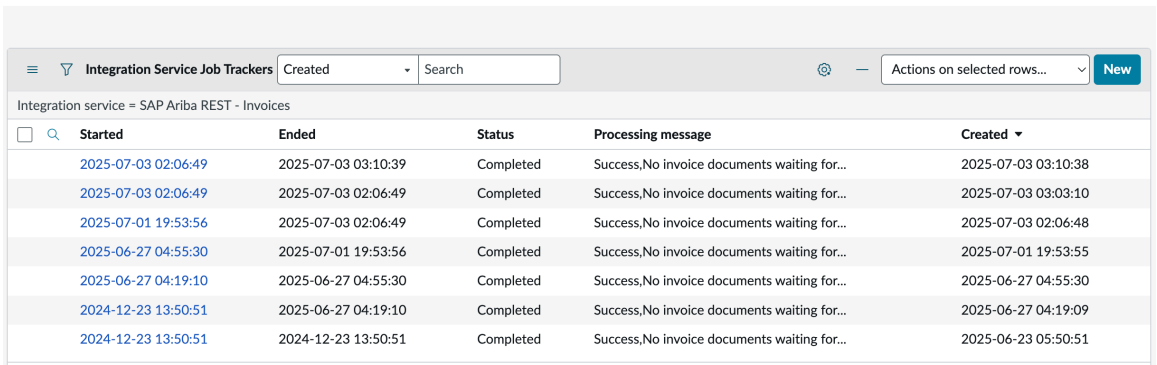
Look up primary data in SAP Ariba

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

Use 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.

Supplier Lifecycle Operations Integration with SAP Ariba

The Supplier Lifecycle Operations integration with SAP Ariba supports the following flows and subflows:

Flow and subflow details for Supplier Lifecycle Operations Integration with SAP Ariba

Flow/Subflow	Description
Flow	
Create Supplier in SAP Ariba	Creates suppliers in SAP Ariba
Update supplier contact in SAP Ariba.	Updates supplier contact details in SAP Ariba
Update supplier info in SAP Ariba.	Updates supplier information in SAP Ariba
Update supplier legal entities in SAP Ariba.	Updates supplier's legal entity details inSAP Ariba
Update supplier location in SAP Ariba.	Updates supplier location details in SAP Ariba
Update supplier payment information in SAP Ariba.	Updates supplier payment information in SAP Ariba
Subflow	
Create supplier in SAP Ariba.	Creates suppliers in SAP Ariba
Update supplier details in SAP Ariba.	Updates supplier detailsSAP Ariba
Update supplier details to in process.	Updates supplier details to in process.

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Important:

These flows and 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 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	
Award Sourcing Event in SAP Ariba REST	Awards sourcing events in SAP Ariba REST
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	
Award Sourcing Event in SAP Ariba REST	Awards sourcing events in SAP Ariba REST
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

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.

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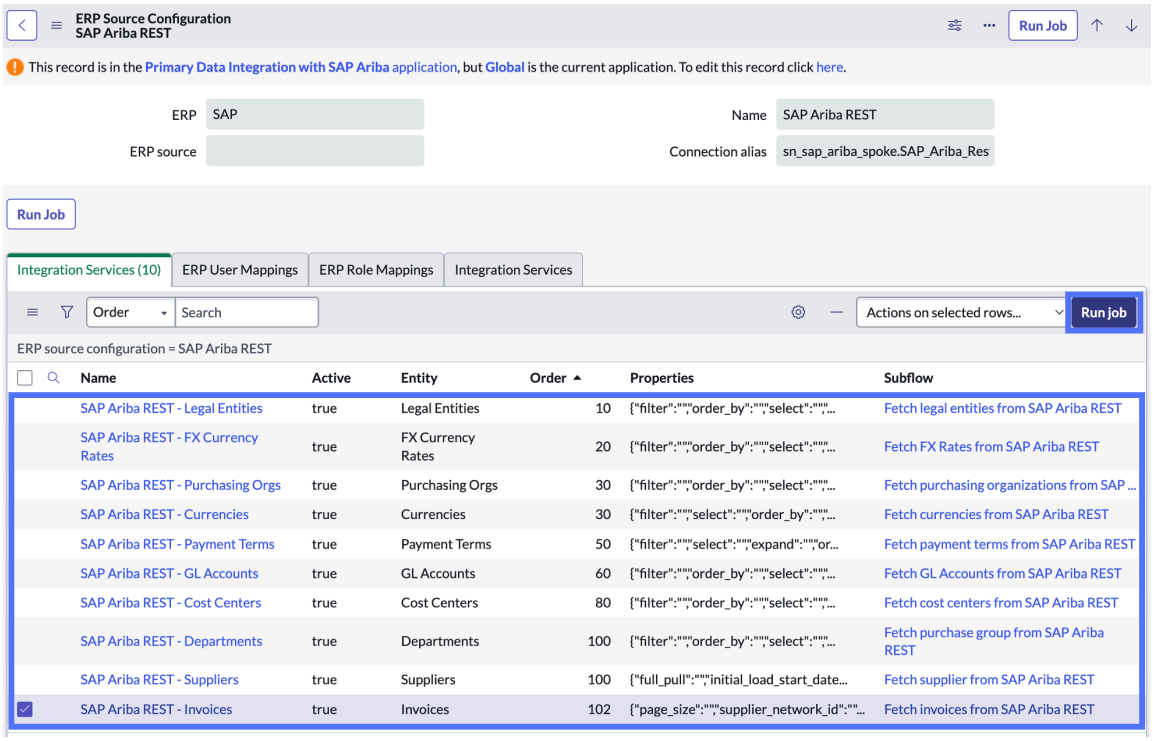
Before you begin

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.

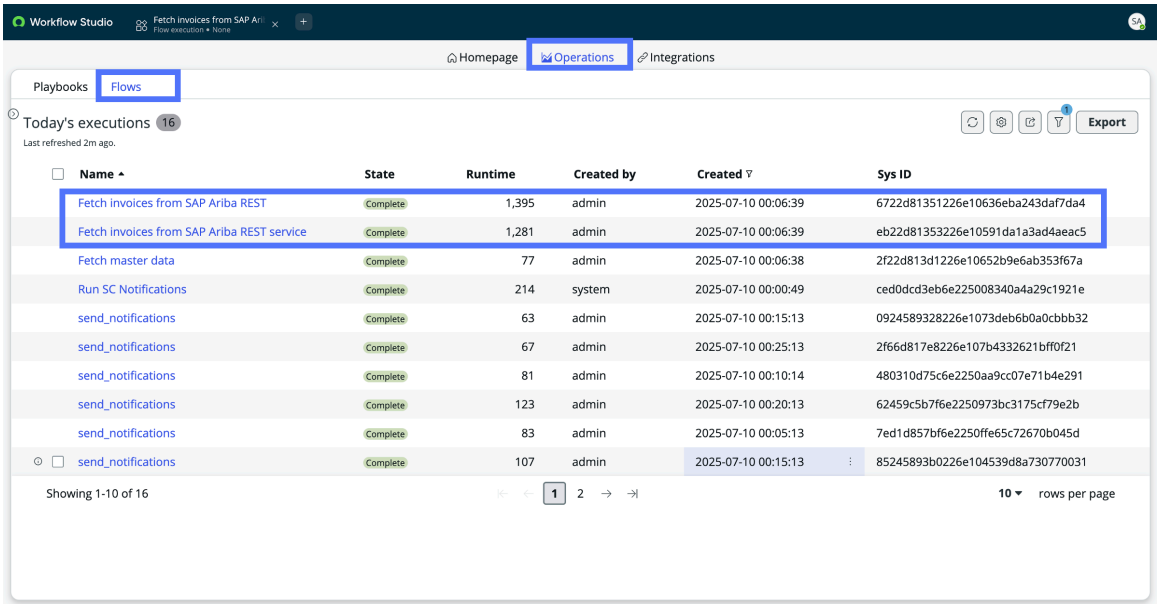
Run subflows in SAP Ariba



5. Navigate to **All** > **Process Automation** > **Workflow Studio**.
6. From the Workflow Studio home page, select the **Operations** tab and then select **Flows** tab.

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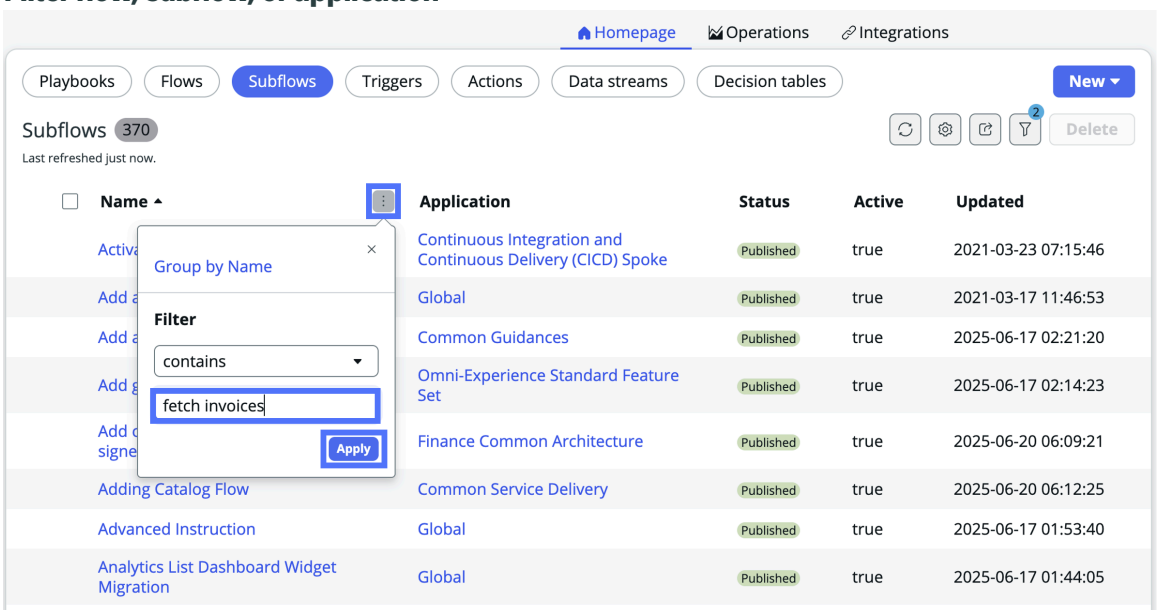
Flow execution in SAP Ariba



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.

The flow or subflow gets executed.

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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

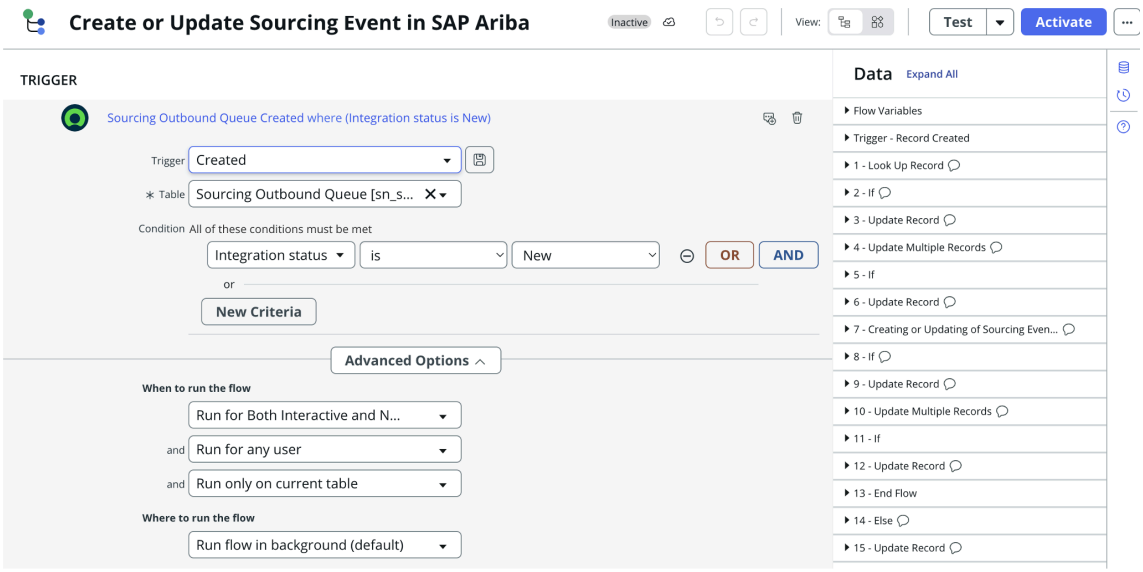
Role required: sn_fcms_intg.admin, sn_shop.procurement_specialist, connection_admin

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.

   The flow or subflow gets executed.

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 **More actions**, 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.

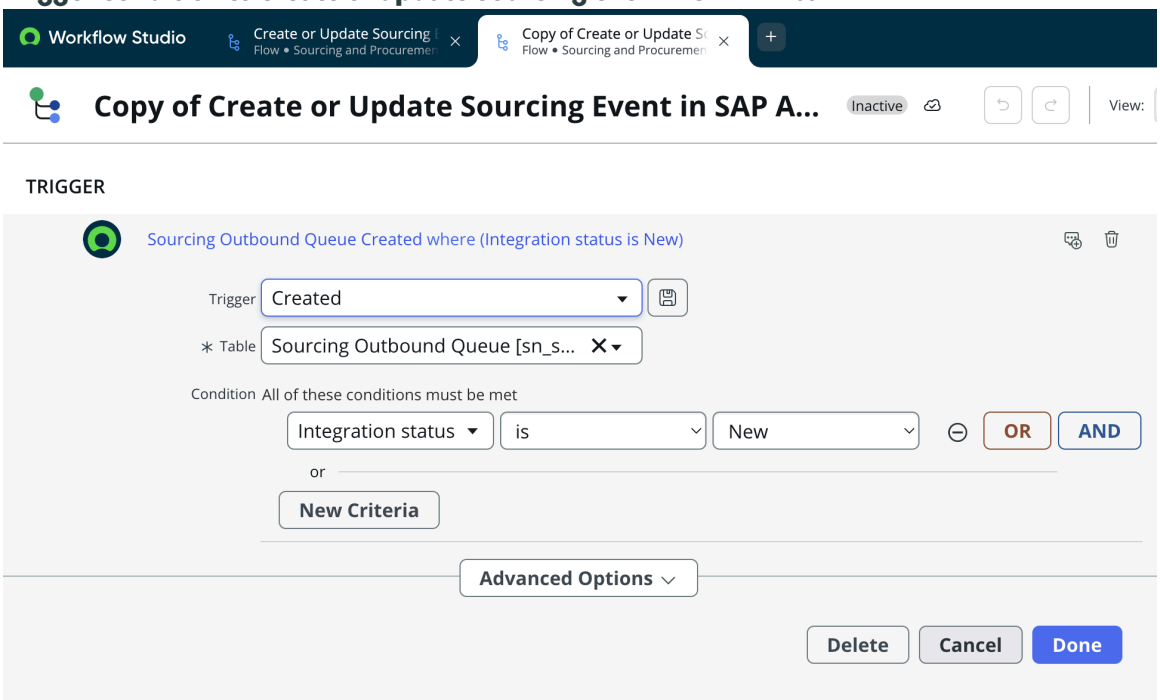
   - Make sure that the flow or subflow is available and activated in the base system.
   - Activate the copied flow after making the required changes.

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.

You have successfully copied and executed the flow.

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 instance.

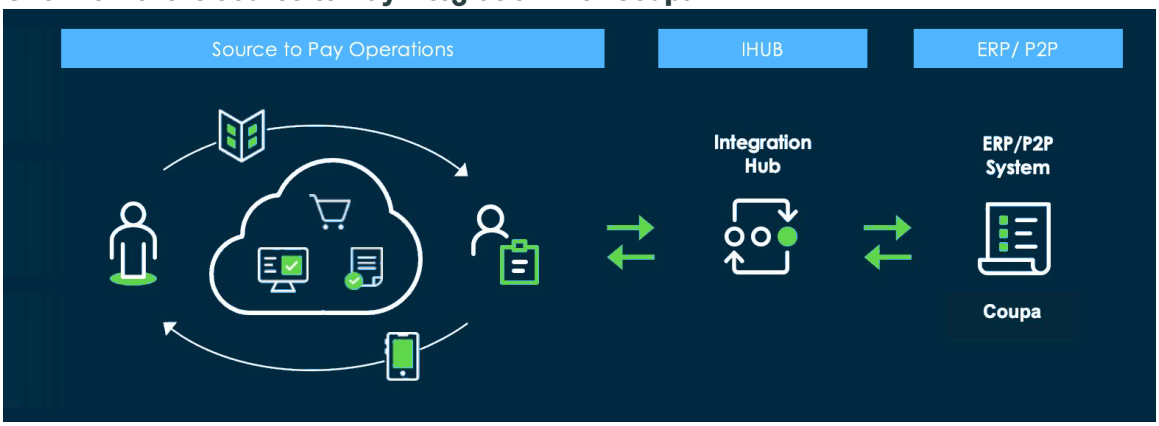
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Key Features

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 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.

Configure Source-to-Pay integration with Coupa

Integrate your ServiceNow instance and Coupa by creating a custom OAuth application in Coupa to authenticate ServiceNow requests.

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.

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- 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
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

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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 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:

- 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. For more information, see Define an ERP source configuration for Coupa.
2. Create a basic authentication profile that can be used for web service integration with Coupa.

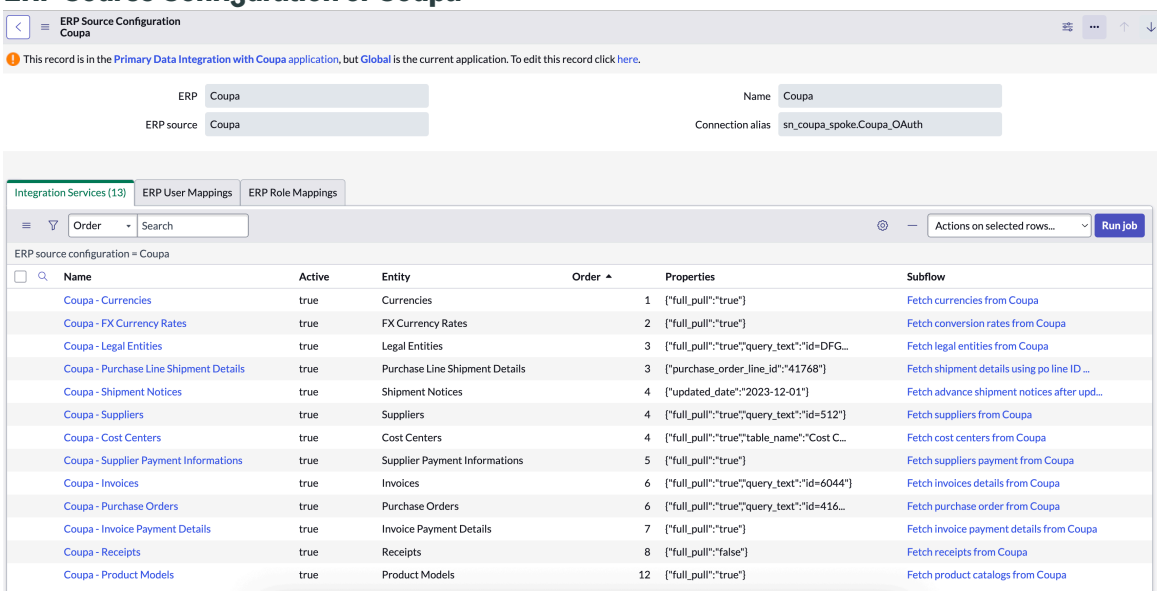
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3. Register the Coupa integration username and password to create the authentication profile and associate it to service maps.
4. Define source configuration for ERP source.

   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 required entities. For more information, see Configure integration services for Coupa.

ERP Source Configuration of Coupa



You have configured the ERP source for 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.

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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.

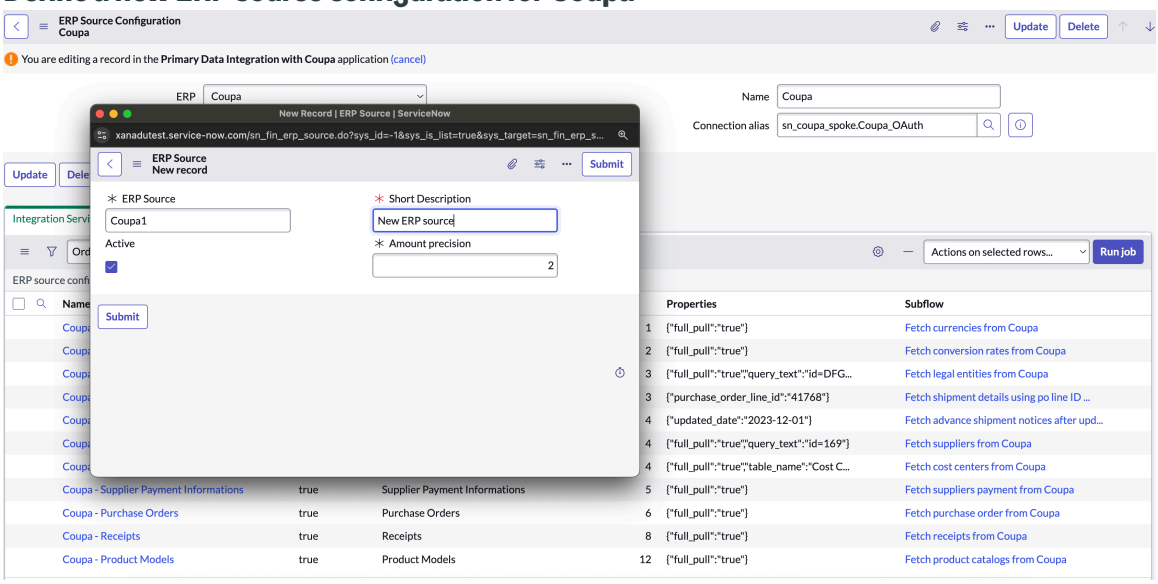
   d. In the ERP Source dialog, select **New**.

   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.

Define a new ERP source configuration for Coupa



   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:

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- 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 integration services for Coupa

Configure integration services 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.

https://player.vimeo.com/video/1121974890?h=4bea4646bc&badge=0&autopause=0&player_id=0&app_id=58479

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.

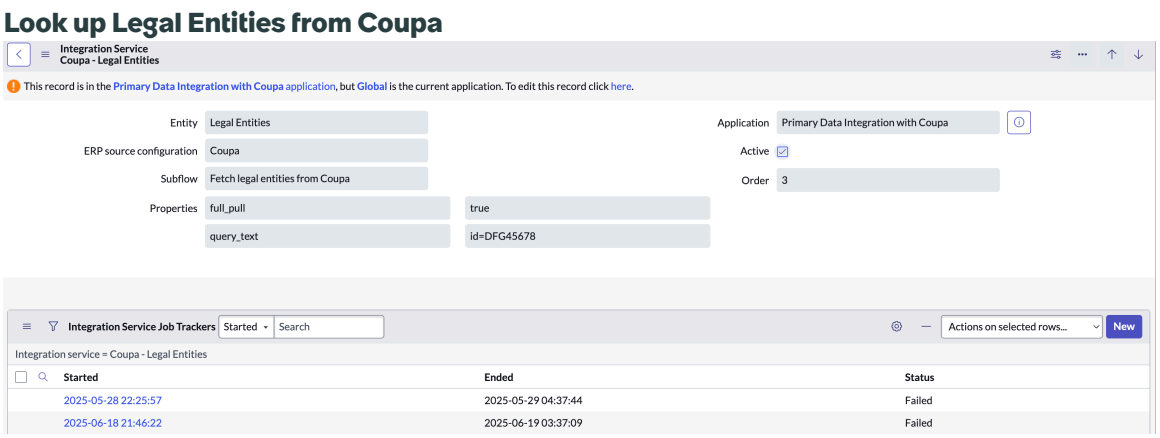
Role required: admin

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 Integration services. 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.

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Integration service record

Field	Description
Entity	Type of entity for which you want to configure the integration service.
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: `[ { "parameter": "LEGAL_ENTITY_NAME", "operator": "=", "value": "Vision ADB", "operand": "NONE" } ]` ○ **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.

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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.
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.

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Subflow	Description
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.

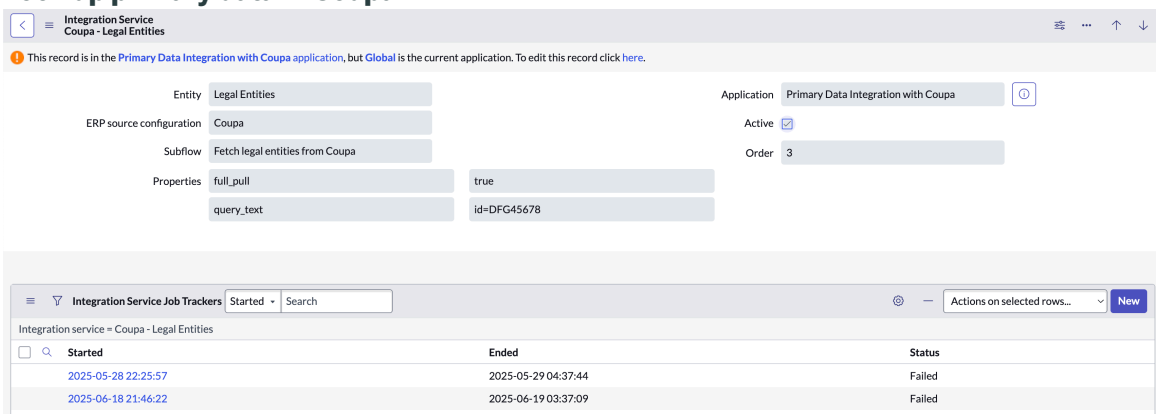
Once data is pulled into staging tables, the transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows.

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.

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

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Look up primary data in Coupa (continued)

Entity	Description	Table name
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	Purchase Order inbound staging table
Invoice Payment Details	Look up invoice payment details from Coupa.	Invoice payment detail import inbound table
Receipts	Look up receipts from Coupa.	Receipt inbound staging table
Product Models	Look up product models from Coupa.	Product Model Stage inbound staging table

Use Source-to-Pay integration with Coupa

Use the Source-to-Pay integration with Coupa to process employee information at ServiceNow.

Trigger a flow or subflow in Coupa

Manually trigger a flow or subflow in Coupa.

Before you begin

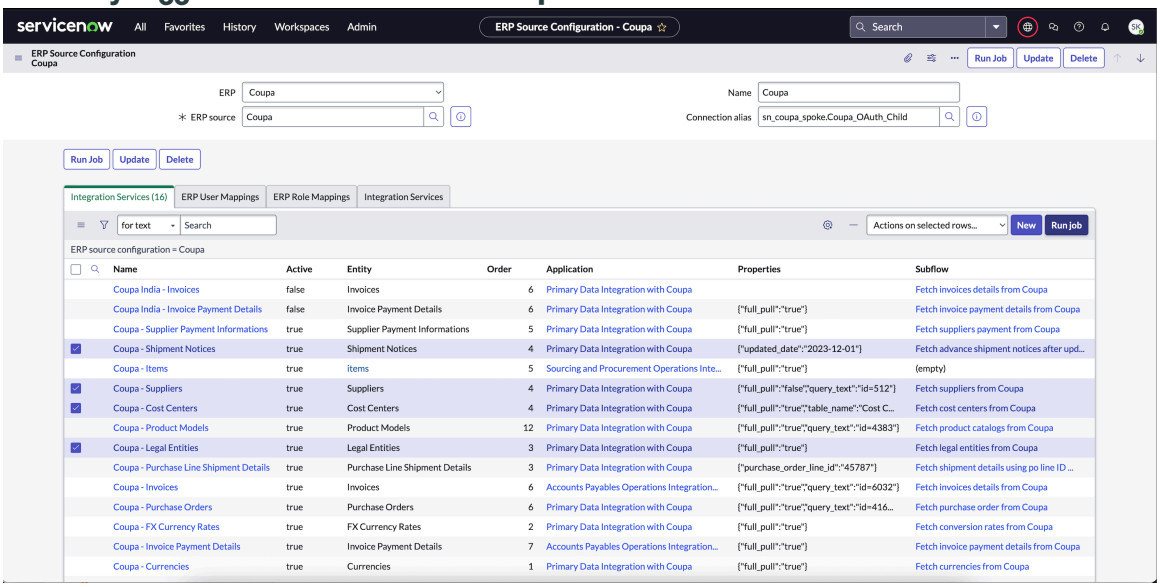
Role required: sn_fcms_intg.integration_user

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.

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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.

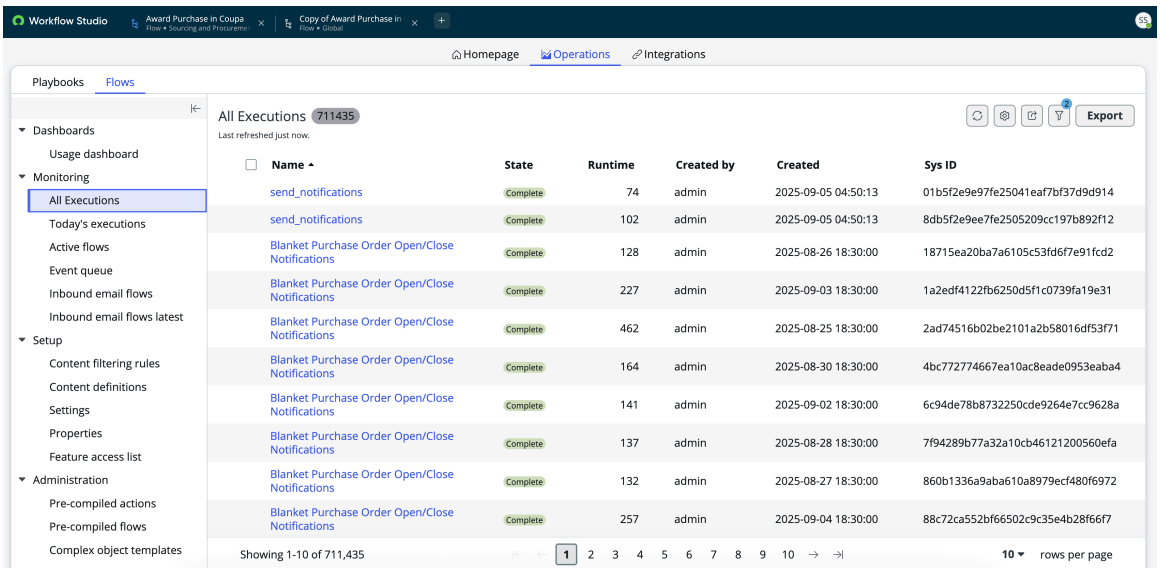
Before you begin

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.

Execution status of the flows



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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.

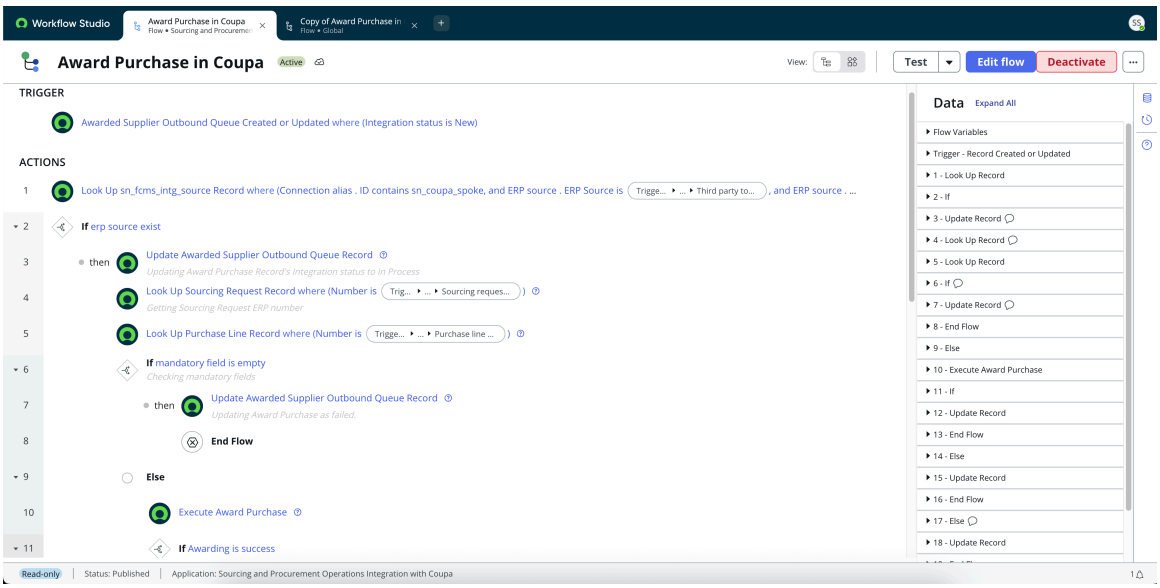
Use a flow or subflow in Coupa (outbound)

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.

Award Purchase 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.

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

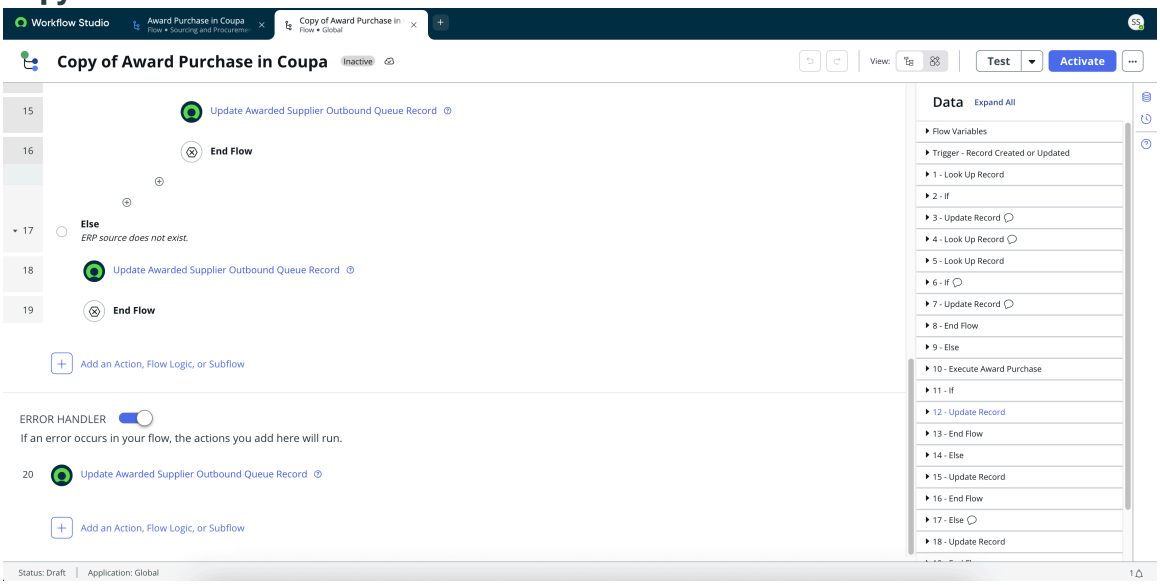
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Procedure

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 **More actions**, and select **Copy flow**.

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

Copy of a Award Purchase 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.

> **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.

You have successfully copied and executed the flow.

Source-to-Pay integration with Oracle Financial Cloud

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

Key features

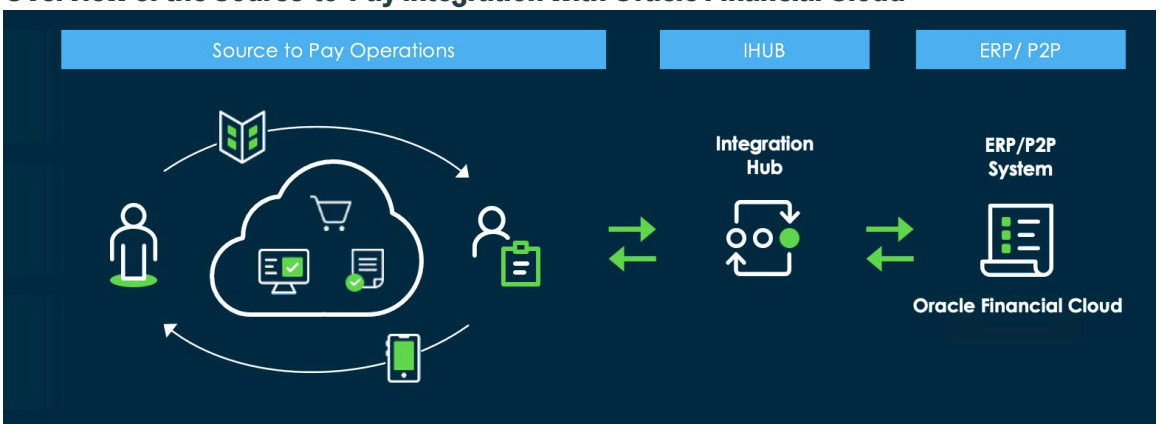
With this application, you can perform the following:

- Look up Currencies, General Ledger (GL) accounts, Legal entities, Payment terms details, Plant Address, Cost Center, Purchasing Orgs, and Purchasing Groups from Oracle Financial Cloud.
- Create or update Supplier locations in Oracle Financial Cloud

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- Create or update Supplier payment details in Oracle Financial Cloud
- Create, update, or deactivate Suppliers in Oracle Financial Cloud

Overview of the Source-to-Pay integration with Oracle Financial Cloud



Prerequisites

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

ServiceNow Store app plugins: sn_Oracle Financial Cloud_spoke.

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

Request apps on the Store

Visit the ServiceNow Store 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 Financial Cloud system through REST APIs.

Configure the Source-to-Pay integration with Oracle Financial Cloud

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

Application set up

Verify that you have performed the following:

- Activated the Source-to-Pay integration with the Oracle Financial Cloud application from ServiceNow Store. This automatically activates the Oracle Financial Cloud Spoke.
- Set up Oracle EBS Spoke.

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- Activated the Source-to-Pay integration framework from ServiceNow Store. Source-to-Pay integration with Oracle Financial Cloud uses the Source-to-Pay integration framework to pull tasks from Oracle Financial Cloud into ServiceNow. For more information on the Source-to-Pay integration framework, see Source-to-Pay integration framework.

Primary Data Integration with Oracle Financial Cloud's Dependencies

Install the following dependencies of Primary Data integration with Oracle Financial Cloud. 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 Financial Cloud Integration that pulls tasks into ServiceNow. For more information, see Run scheduled jobs in Oracle Financial Cloud.

Primary Data Integration with Oracle Financial Cloud

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Source-to-pay Common Architecture	sn_shop
Supplier Common Architecture	sn_slm
Oracle Financial Cloud Spoke	sn_ofc_spoke.OracleCloudFinancials

Supplier Lifecycle Operations Integration Dependencies with Oracle Financial Cloud

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

Supplier Lifecycle Operations Integration with Oracle Financial Cloud

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

ERP source configuration for Oracle Financial Cloud

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.

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The ERP source configuration for Oracle Financial Cloud 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'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 perform the ERP Source configuration for Oracle Financial Cloud, follow these steps:

1. Define the ERP source that you want to integrate with Oracle Financial Cloud integration.
2. Create a basic authentication profile that can be used for web service integration with Oracle Financial Cloud.
3. Register the Oracle Financial Cloud 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 ERP source configuration for Oracle Financial Cloud.
5. Configure service maps for the following entities:
   - **Suppliers**

     Set up subflows for the source configuration to lookup suppliers from Oracle Financial Cloud.
   - **Payment Terms**

     Set up subflows for the source configuration to lookup payment terms from Oracle Financial Cloud.
   - **Legal Entities**

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

     Set up subflows for the source configuration to lookup currencies from Oracle Financial Cloud.
   - **GL Accounts**

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Set up subflows for the source configuration to lookup GL accounts from Oracle Financial Cloud.

- **Purchase Groups**

  Set up subflows for the source configuration to lookup purchase groups from Oracle Financial Cloud.

- **Purchasing Orgs**

  Set up subflows for the source configuration to lookup purchasing orgs from Oracle Financial Cloud.

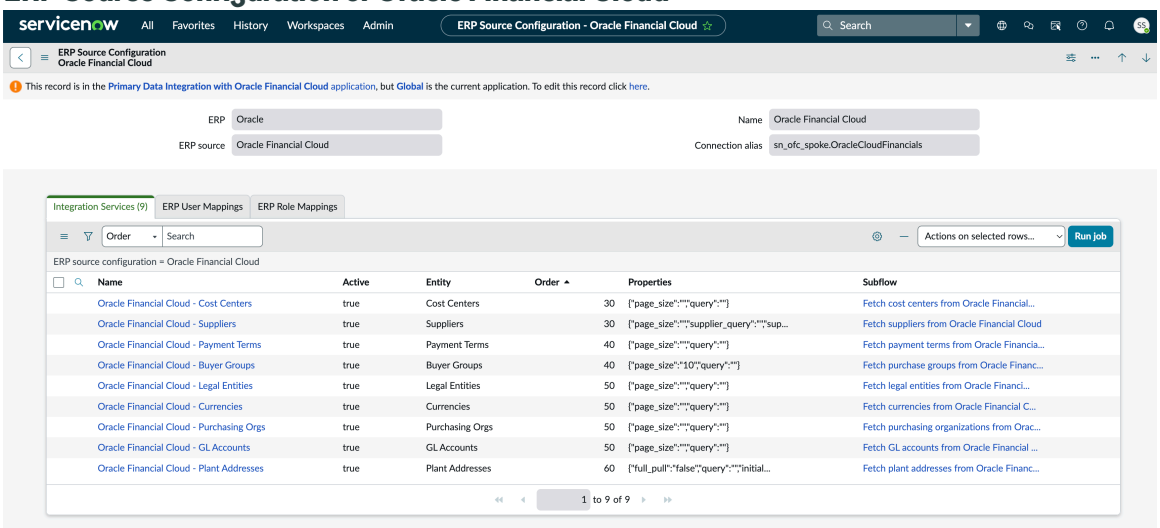
- **Cost Center**

  Set up subflows for the source configuration to lookup purchasing cost center from Oracle Financial Cloud.

- **Plant Addresses**

  Set up subflows for the source configuration to lookup plant addresses from Oracle Financial Cloud.

ERP Source Configuration of Oracle Financial Cloud



6. Configure a scheduled job to synchronize primary data updates from Oracle Financial Cloud.
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.

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

8. Load data to the Oracle Financial Cloud 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.

   You have configured the ERP source for Oracle Financial Cloud.

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Define ERP source configuration for Oracle Financial Cloud

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

Before you begin

Role required: sn_shop.procurement_administrator

About this task

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

   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 Financial Cloud using the search option.
5. To create a new ERP source, perform the following steps:

   a. Select **New**.

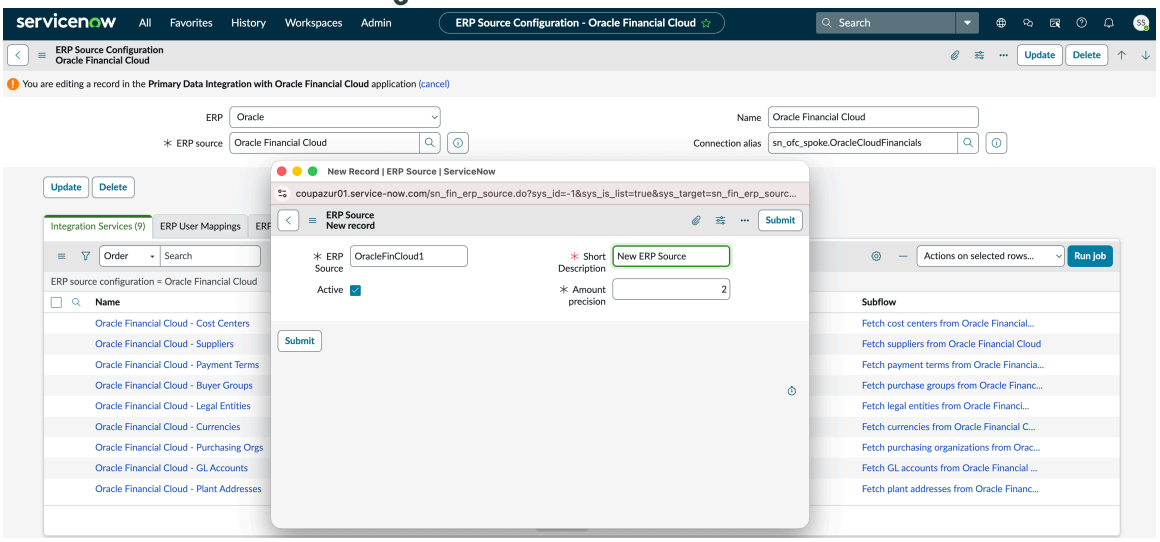
   b. On the form, fill the fields.

Define a new ERP source configuration

Field	Description
ERP Source	ERP source for which the integration is required. For example, Oracle Financial Cloud.
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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Define a new ERP source configuration



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

> **Note:** Oracle Financial Cloud 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 Financial Cloud base system provides five service mappings. For other Oracle Financial Cloud 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 Financial Cloud 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 Oracle Financial Cloud

For configuring integration services, provide the connection end point and the Oracle Financial Cloud 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 Oracle Financial Cloud 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 Financial Cloud ERP integration using SOAP services.

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

Role required: sn_fcms_intg.integration_user

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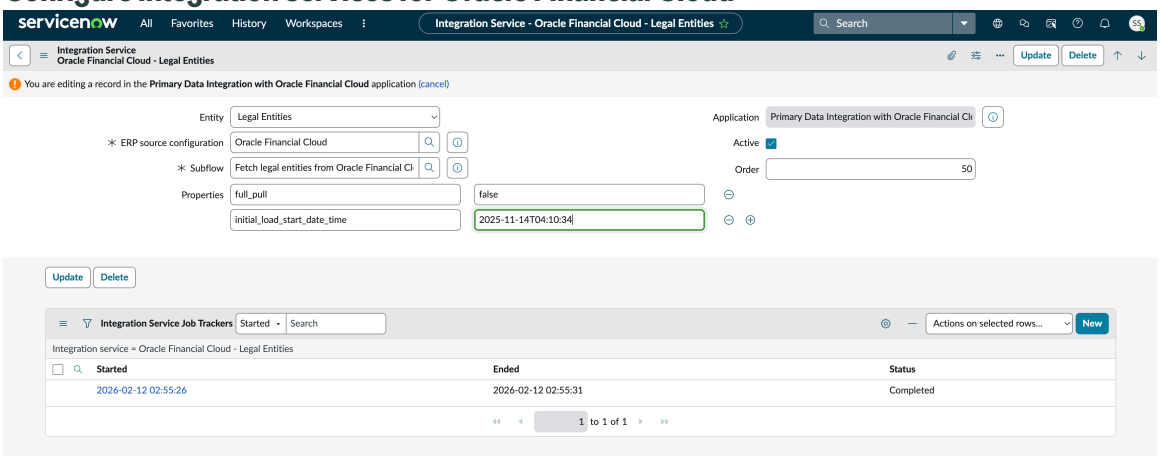
About this task

If the application requires multiple Oracle Financial Cloud 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 integration services.
   For example, Oracle Financial Cloud.
3. In the Integration Services list, select the service that you want to configure.

Configure integration services for Oracle Financial Cloud



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 services.
Application	Name of the application. For example, Oracle Financial Cloud.
ERP Source configuration	The ERP source mapped to the entity. For example, Oracle Financial Cloud.
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: `[` `  {`

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Field	Description
	<pre>"parameter": "LEGAL_ENTITY_NAME", "operator": "=", "value": "Vision ADB", "operand": "NONE" }]</pre> ○ **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**.
   The integration service is configured for the selected entity.

Load data to ERP user-mapping table for Oracle Financial Cloud

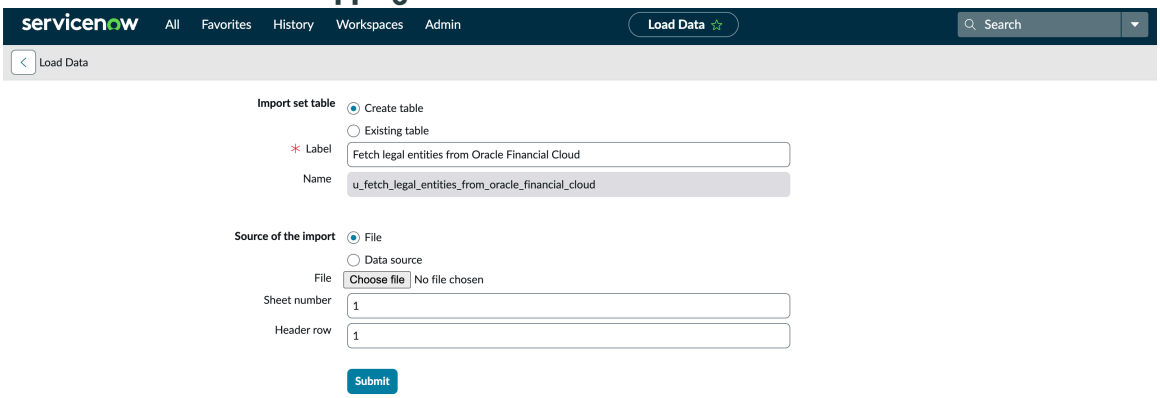
Set up Oracle Financial Cloud and ERP User ID mapping for the integration to work. The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule.

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 the **File** option.
4. Select **Choose File** to import the source Excel spreadsheet.

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Load data to ERP user-mapping table for Oracle Financial Cloud



5. **Optional:** If appropriate, specify the Work sheet and Header row number.
6. Select **Submit**.
   The imported data is now available in the new Import Set table.
7. 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.
8. Transform the data from the import set table to the target table.
   For more information, see Run an import.
   The data is imported into the Oracle Financial Cloud 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 Financial Cloud ERP user mappings by navigating to **Finance - ERP Integration** > **ERP Users**.

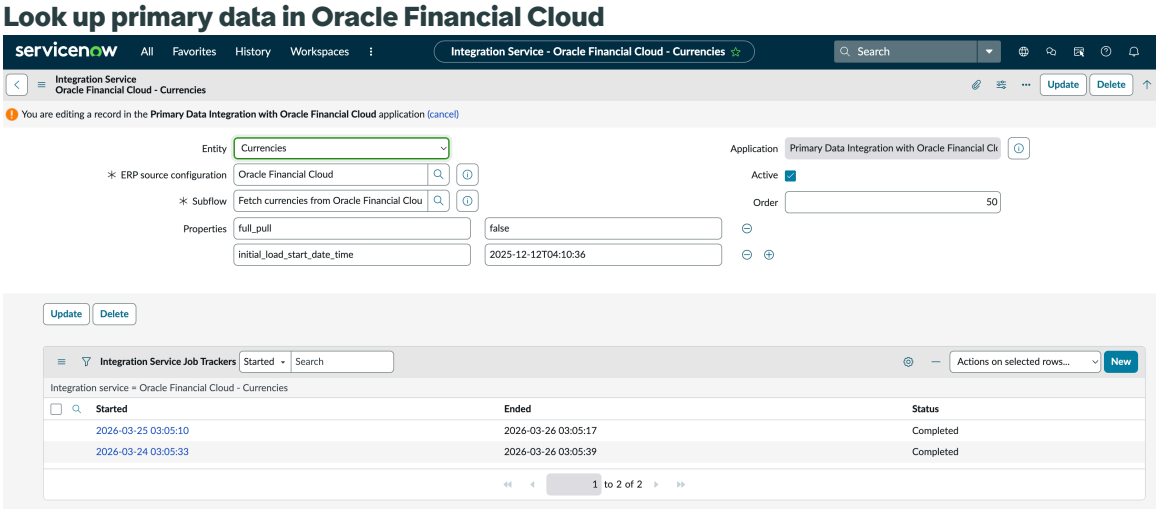
Note: If an ERP user mapping isn't required, you can deactivate it. To deactivate a mapping, in the ERP User Mapping form, select the **Inactive** check box.

Look up primary data in Oracle Financial Cloud

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.

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You can manually run jobs for the following entities:

Look up primary data in Oracle Financial Cloud

Entity	Table name
Suppliers	Supplier Location inbound staging table
Payment Terms	Payment Terms Stage inbound staging table
Legal entities	Legal Entity Stage inbound staging table
Currencies	FX Currency Stage inbound staging table
GL Accounts	GL Account Stage inbound staging table
Purchasing Organizations	Purchase Entity Stage inbound staging table
Plant Addresses	CMN Location Stage inbound staging table
Cost Centers	Cost Center 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.

Scheduled jobs to look up primary data in Oracle Financial Cloud

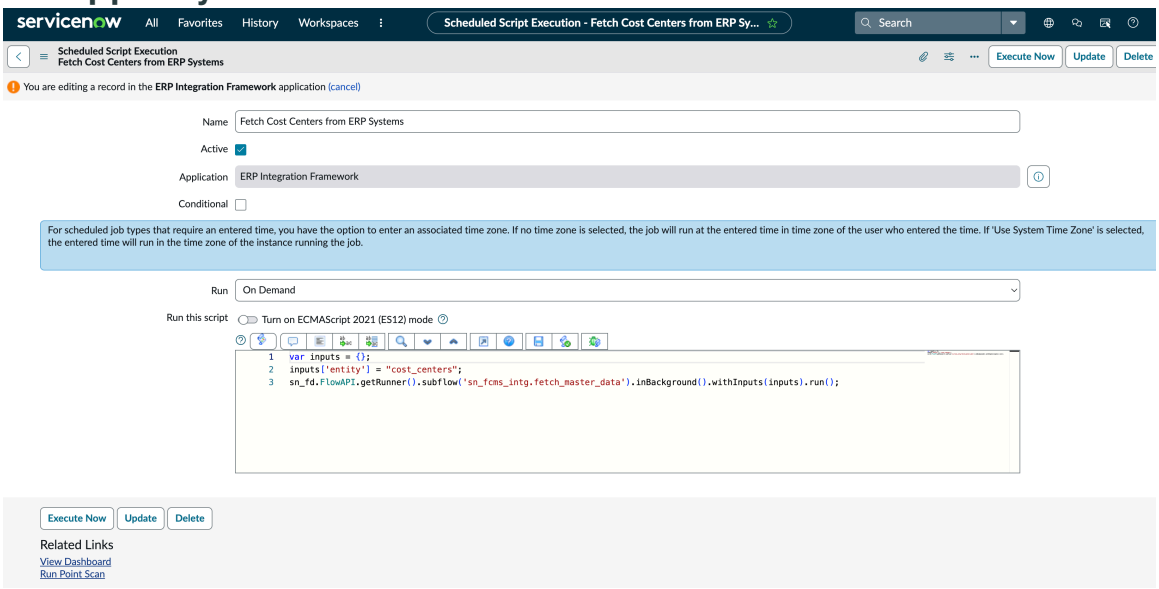
You can schedule on-demand jobs to be run at specific intervals of time to fetch primary data from different Oracle Financial Cloud ERP sources into ServiceNow.

Before you start the Oracle Financial Cloud 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 an 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 a subflow, which is associated with an entity as shown in the following figure. The subflow queries the active entities or ERP source configuration (optional) listed in the integration service table.

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Look up primary data in Oracle Financial Cloud



Run scheduled jobs in Oracle Financial Cloud

Run adhoc scheduled jobs to look up entity primary data from the target Oracle Financial Cloud 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.

Use the Source-to-Pay integration with Oracle Financial Cloud

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

Use schedule flows in Oracle Financial Cloud

Use the schedule flows to retrieve information from Oracle Financial Cloud, including Currencies, General Ledger (GL) accounts, Legal entities, Payment terms details from Oracle Financial Cloud.

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 Financial Cloud integration supports the following subflows:

Primary Data Integration with Oracle Financial Cloud

The Primary Data Integration with Oracle Financial Cloud integration supports the following subflows or actions:

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Scheduled subflow details for Primary Data Integration with Oracle Financial Cloud

Subflow	Description
Fetch Payment Terms	Use this subflow to fetch and synchronize all payment terms from Oracle Financial Cloud system.
Fetch Legal Entities	Use this subflow to fetch and synchronize all legal entities from Oracle Financial Cloud system.
Fetch Currencies	Use this subflow to fetch and synchronize all currencies from Oracle Financial Cloud system.
Fetch GL Accounts	Use this subflow to fetch and synchronize all GL Accounts from Oracle Financial Cloud system.
Fetch Purchase Groups	Use this subflow to fetch and synchronize all purchasing groups from Oracle Financial Cloud system.
Fetch Cost Center	Use this subflow to fetch and synchronize all cost centers from Oracle Financial Cloud system.
Fetch Purchasing Orgs	Use this subflow to fetch and synchronize all purchasing organizations from Oracle Financial Cloud system.
Fetch Plant Address	Use this subflow to fetch plant addresses from Oracle Financial Cloud system.

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 Financial Cloud

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

Scheduled subflow details for Supplier Lifecycle Operations Integration with Oracle Financial Cloud

Flow	Description
Create or update supplier location	Creates or updates supplier location in Oracle Financial Cloud.
Create or update supplier payment information	Creates or updates supplier payment information in Oracle Financial Cloud.
Create, update or deactivate supplier	Creates or updates or deactivates supplier details in Oracle Financial Cloud.

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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.

Manually trigger flows or subflows in Oracle Financial Cloud (Inbound)

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

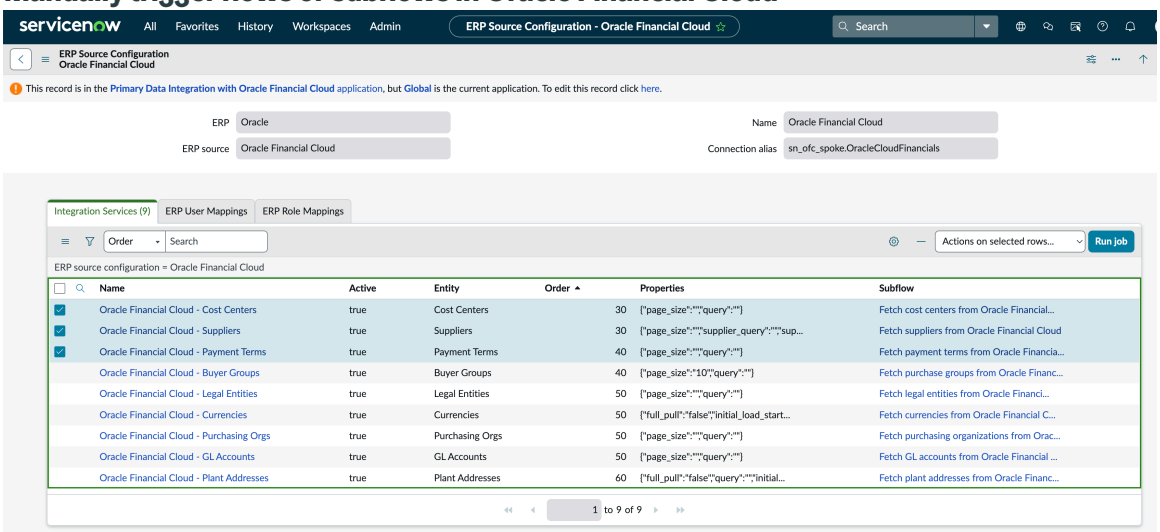
Before you begin

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 **Oracle Financial Cloud** ERP source to manually trigger the flows or subflows.
3. In the Integration Services list, select the subflows that you want to manually trigger.

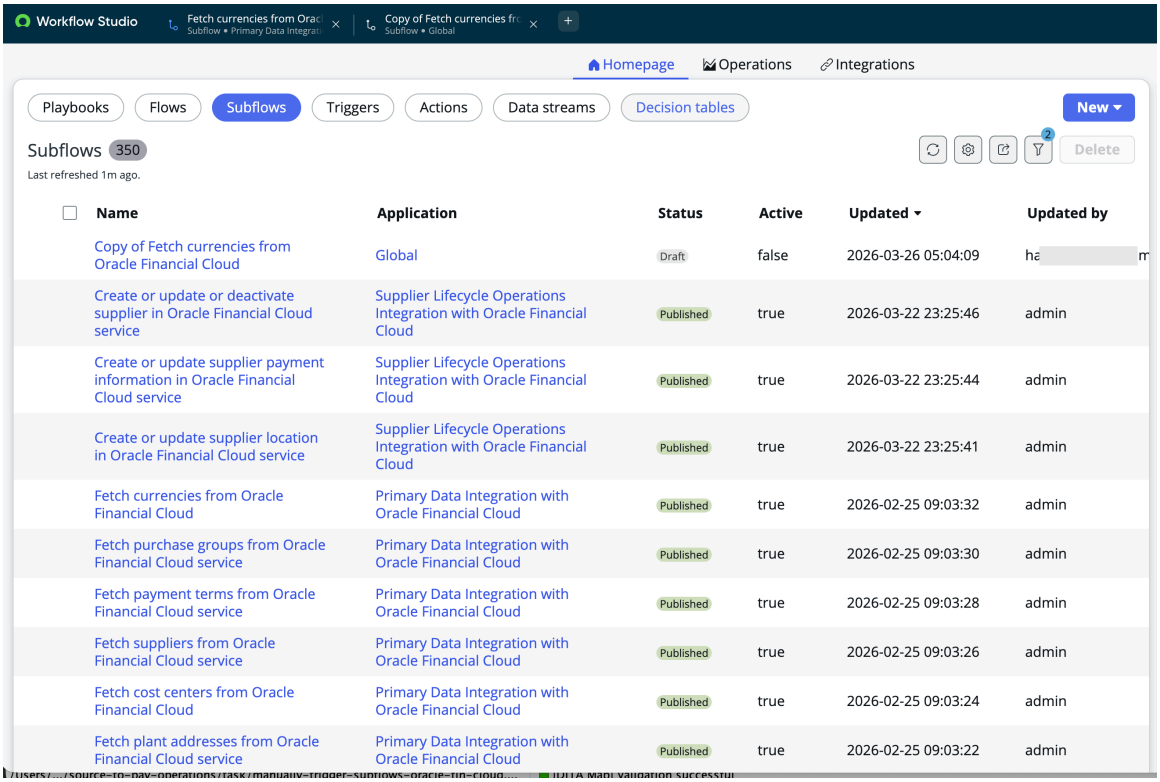
Manually trigger flows or subflows in Oracle Financial Cloud



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 Financial Cloud** application name using the filter icon, and select **Apply**.
   You can view the flows or subflows that you triggered.

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Flows or subflows in Workflow Studio



9. You can use the Subflow Inputs and Outputs as a part of the base system to execute the flow or subflow.

   Note: Don't modify the trigger condition.

   The flow or subflow is executed.

Use a flow or subflow in Oracle Financial Cloud (Outbound)

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

Before you begin

Role required: sn_fcms_intg.integration_user

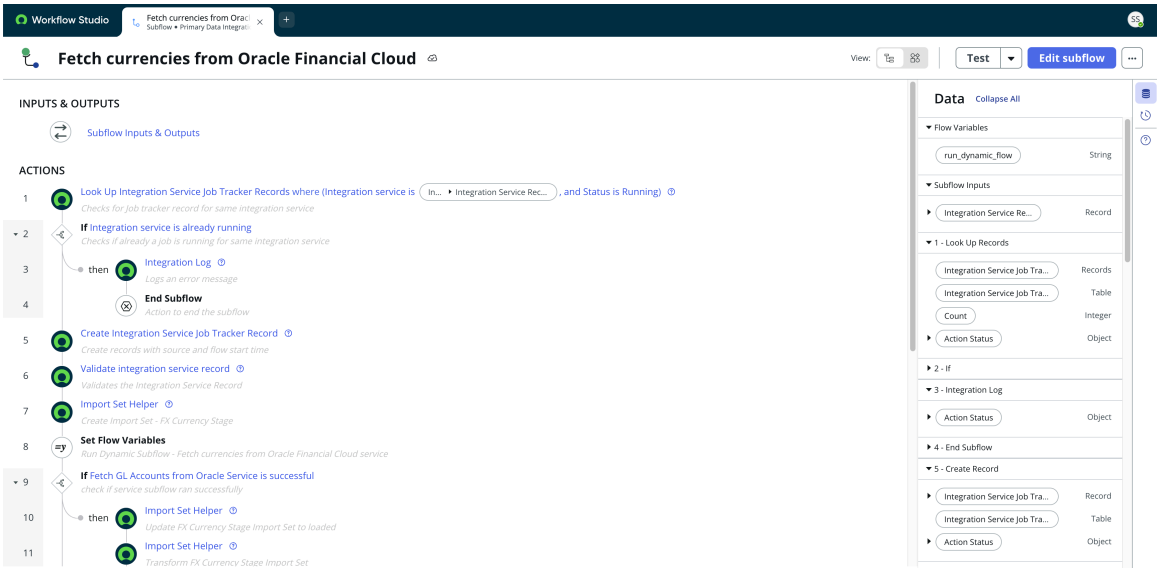
Procedure

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

   For example, select **Fetch currencies from Oracle Financial Cloud** subflow.

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Use a flow or subflow in Oracle Financial Cloud



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 is executed.

Copy a flow or subflow in Oracle Financial Cloud

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

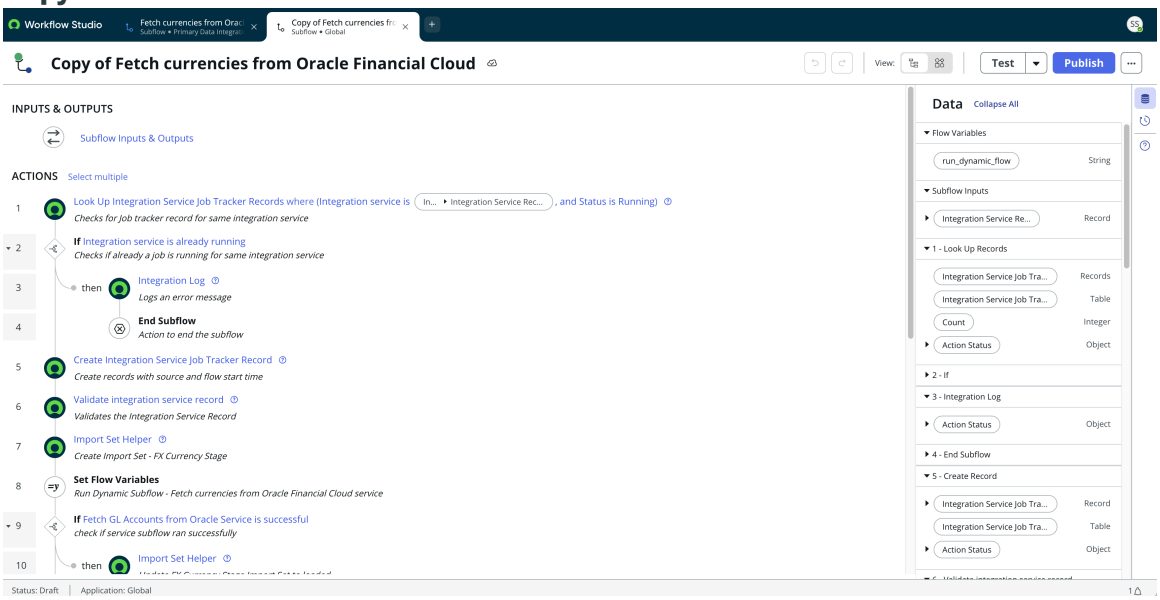
Procedure

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. Select **More actions**, and select **Copy flow**.

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

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Copy a flow or subflow in Oracle Financial Cloud



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 Subflow **Inputs & Outputs** for providing your inputs and outputs as per your requirements.

   Note:
   - Don't modify the trigger condition.
   - 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
7. Select **Done**.
8. Select **Publish** to publish the subflow.
9. Select **Publish** again to confirm the publication of the subflow.
   You have successfully copied and executed the flow.

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

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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 creating, managing, and executing legal sales contracts from completed quotes.

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.

Invoices

A document issued by a seller to a buyer, indicating the products, quantities, and agreed prices for products or services provided.

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

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Receipt

A document acknowledging that a specified amount of money, goods, or services has 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 application

An external software system that can be integrated with ServiceNow to extend its capabilities.

3CLogic

A ServiceNow partner that provides native voice and SMS capabilities to complement ServiceNow’s digital channels.

W

workflow

Defined sequence of steps automating processes in Sales Customer Relationship Management.

Source-to-Pay integrations with Oracle reference

Reference topics provide additional information on integrating Source-to-Pay Operations with Oracle, including sales orders, procurement, finance, and so on, between Source-to-Pay and ERP systems.

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Set system properties for Oracle Integration

Use these system properties to configure settings for the Oracle integration from the System Properties page.

Role required:

- **Read Role**: sn_shop.procurement_specialist, sn_shop.shopper, sn_fcms_intg.admin
- **Write Role**: sn_fcms_intg.admin

To access the system properties list, perform the following steps:

1. Navigate to **All**.
2. Search for `sys_properties_list.do` and open the system properties list.
3. Look up Primary Data Integration with Oracle using the filter option.
4. The following system properties are available as a part of the base system.

Note: You can modify these values only if necessary.

Purchase Order Management

The ServiceNow® Purchase Order Management application enables your suppliers and buyers to streamline procurement processes by efficiently managing purchase orders.

Get started

Explore



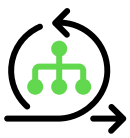
Learn how Purchase Order Management can help you with its key features and benefits.

Configure



Plan and configure your implementation.

Use



Learn how buyers and suppliers can use Purchase Order Management to work on exceptions.

Reference



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 https://www.servicenow.com/docs/access?context=purchase-order-management-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as Get to Value Quickly with S2P Operations and more, from ServiceNow University.

Best Practices

Explore the Best Practices content library to access resources and proven guidance that help accelerate the implementation and deployment of Source-to-Pay Operations features at Best Practices.

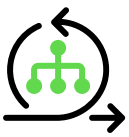
ServiceNow Community

Connect with other Purchase Order Management users at ServiceNow Community.

ServiceNow Otto for Purchase Order Management (POM)

Use ServiceNow Otto for Purchase Order Management (POM) to automatically create purchase order exceptions or confirmations, and for a conversation-like experience to mitigate purchase order exceptions.

Get started

Explore	Configure	Use
		
Learn more about ServiceNow Otto for POM	Configure the ServiceNow Otto for POM application to get started	Use agentic workflows in ServiceNow Otto for POM

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI 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 AI 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 AI 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. Furthermore, 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. 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 ServiceNow Otto for Purchase Order Management (POM)

With ServiceNow Otto for POM, you can use generative AI to support purchase order management tasks. You can convert unstructured supplier emails into a prioritized list of exceptions and use a conversation-like experience to mitigate purchase order exceptions.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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ServiceNow Otto for POM overview

ServiceNow Otto for POM enables you to use agentic workflows focused on purchase order exception management.

ServiceNow Otto for POM benefits

ServiceNow Otto for POM offers the following benefits:

- Frees buyers from manual email triage and data entry.
- Delivers immediate acknowledgment and processing of supplier inquiries.
- Tracks all exceptions in the application with full audit trail visibility.
- Guides operational buyers identify and apply the most effective solutions to resolve purchase order exceptions.

ServiceNow Otto for POM workflows

Agentic workflows

Workflow	Feature	User
Define PO exception mitigation strategy	Helps buyers identify and execute exception mitigation strategies by analyzing delivery gaps and proposing order changes with alternative suppliers.	• sn_poem_gen_ai_now_assist_fulfiller • sn_poem_operational_buyer

Supporting information for ServiceNow Otto for Purchase Order Management (POM)

Get a quick overview of the important information that is related to the ServiceNow Otto for Purchase Order Management (POM) application.

Supported versions

ServiceNow Otto for POM is supported starting with Brazil.

Supported user interfaces

The ServiceNow Otto for POM application includes the workflows that are listed in the following table.

ServiceNow Otto for POM supported interfaces

Interface	Workflow
Purchase order exception	Define PO exception mitigation strategy
Purchase order management tab in Source-to-Pay Workspace	Define PO exception mitigation strategy

Application information

Activate the ServiceNow Otto for POM store app (sn_poem_gen_ai) to use the GenAI capabilities for streamlining the purchase order execution process.

This store app has the following dependencies:

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- ServiceNow Otto for Platform (sn_genai_platform)
- ServiceNow Otto for FSC Common (com.snc.sn_fsc_genai)
- Purchase Order Management application (com.snc.sn_poem_core)
- ServiceNow Otto for POM store app (sn_poem_gen_ai)

Activate the applications in the following order:

- ServiceNow Otto for Platform (sn_genai_platform)
- ServiceNow Otto for FSC Common (sn_fsc_genai)
- Purchase Order Management application (sn_poem_core)
- ServiceNow Otto for POM store app (sn_poem_gen_ai)

For more information, see Configure ServiceNow Otto for Purchase Order Management (POM).

Configure ServiceNow Otto for Purchase Order Management (POM)

If you have the admin role, you can configure the ServiceNow Otto for Purchase Order Management (POM) application so that an operational buyer or a supplier can use the generative AI skills in Purchase Order Management.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Role required: admin

Procedure

1. Install the ServiceNow Otto for POM plugin (sn_poem_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Supporting information for ServiceNow Otto for Purchase Order Management (POM).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Review the define PO exception mitigation strategy agentic workflow in AI Agentic Studio.

Review the define PO exception mitigation strategy workflow

Review the define PO exception mitigation strategy agentic workflow that uses agentic support to identify and execute mitigation strategies for purchase order exceptions.

Before you begin

Install the ServiceNow Otto for POM plugin (sn_poem_gen_ai).

Role required: admin

About this task

Important: This agentic workflow is active by default. All fields are read-only. To modify other fields, clone the workflow. Currently, you can't edit agent prompts or provide feedback for training.

Users with [sn_poem_core.operational_buyer] role and the Fulfiller [sn_poem_gen_ai.now_assist_fulfiller] role will get mitigation strategies using the Define PO exception mitigation strategy agentic workflow in the Now Assist panel.

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This workflow uses agentic support to identify and execute mitigation strategies for purchase order exceptions.

You can add or remove AI agents from this workflow by making a copy and customizing it. For more information, about copying agentic workflows, see Duplicate an agentic workflow.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
   The **Manage AI specialists, agentic workflows, and AI agents** page appears.
2. Select **Agentic workflows**.
3. Open the workflow configuration page by selecting **Define PO exception mitigation strategy**.
   If you want to modify this AI agent, you can refer to Modify an AI agent. Adjust the settings for your specific needs, and activate the duplicated version of the agentic workflow.
4. Select the **Define key requirements** page to review the following fields.

Write a clear description and list of steps

Field	Description
Workflow Name	Define PO exception mitigation strategy.
Workflow description	The Define PO exception mitigation strategy workflow is an AI-powered workflow that resolves purchase order delivery exceptions by analyzing delivery gaps. This workflow then searches for alternative purchase order lines from different suppliers, and creates optimized change requests that combine supplier-suggested modifications with buyer-approved mitigation plans.
List of steps	Instructions for the LLM service.

Add AI agents that can perform these steps

Name	Description	Tools and knowledge sources	Model support	Active
Purchase order plan creation AI agent	Analyzes purchase order exceptions and generates actionable mitigation strategies by calculating delivery gap schedules, identifying alternative purchase order lines from different suppliers, presenting options to buyers (direct edit, system suggestions, or refined search), and executing combined change requests that integrate both supplier-suggested modifications and buyer-approved mitigation plans.	Create Change Requests, Fetch Exception and Gap Schedule Details, Get Editable Purchase Orders	Available	Active

Unsupported model providers

Field	Description
LLM providers	Model providers that this agentic workflow doesn't support.

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Field	Description
	All model providers are supported by the Define PO exception mitigation strategy workflow.

5. Select **Continue**.
6. Review how user and data access is defined to confirm that the default settings meet your requirements by selecting **Define security controls**.

Define who can access this agentic workflow (ACLs)

Field	Description
Decision type	Allow if
Roles	sn_poem_gen_ai_now_assist_fulfiller
User Authenticated	Not applicable
Active	Active

Note: This section defines which users can access and interact with this agentic workflow. An ACL (Access Control List) has been automatically generated.

Define data access

Field	Description
User identity type	Dynamic user
Approved role(s)	sn_poem_gen_ai_now_assist_fulfiller

Note:

The user identity type that this agentic workflow runs under determines the roles and the data access permissions derived from them.

7. Select **Continue**.
8. On the **Add triggers** page, select **Continue**.
9. Review the information in the **Select channels and status** page.

What to do next

After reviewing the agentic workflow, you can get started by selecting **Otto** button on a purchase order exception record or the exception card on the **Purchase order management** tab in the Source-to-Pay Workspace.

Using agentic workflows in ServiceNow Otto for Purchase Order Management (POM)

Use agentic workflows in ServiceNow Otto for Purchase Order Management (POM) to track and resolve anomalies or irregularities in the purchase order (PO) execution process.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Use the following agentic workflows that are available with ServiceNow Otto for Purchase Order Management (POM)

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Available agentic workflows for ServiceNow Otto for Purchase Order Management (POM)

Available agentic workflows	Description	Available AI agents
Define PO exception mitigation strategy	Helps buyers identify and execute the best exception mitigation strategies by analyzing delivery gaps and proposing order changes with alternative suppliers.	Purchase order plan creation AI agent

Important: By default, all agentic workflows and AI agent records are read only.

- Duplicate an agentic workflow
- Create an agentic workflow
- Modify an agentic workflow

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Automated purchase order exception creation from emails

Emails sent by a registered supplier contact are automatically converted to purchase order exceptions or universal requests by using the Email Intent to Action Agentic workflow.

The Email Intent to Action Agentic workflow analyzes incoming supplier emails, identifies the email intent, and executes associated actions using the Intent Identification and Intent Executor agents.

If the email contains multiple intents, the workflow identifies the intent and creates pertinent cases from a single email. For instance, an email contains multiple scenarios such as confirmation for a line, delivery change information for another purchase order line, and questions unrelated to a PO. In this case, a purchase order confirmation, a purchase order exception, and a universal request is created.

For more information on the Email Intent to Action Agentic workflow, see Email Intent to Action Agentic Workflow.

Prerequisites for automated creation of purchase order exceptions

To use this functionality, verify that the following steps are completed:

- Configure the [sn_supplier.slm_email] system property. Edit the **Value** field to contain supplier email address. For more information, see Configure properties for Supplier Case Management.

  Note: If you plan to use or are using the SLO Supplier inbox for scenarios such as supplier case creation, you must use the same inbox for creating purchase order exceptions.

- Deactivate the Create Supplier case for email inbound action. For more information, see Deactivate Create supplier case from email inbound action.
- Activate the Trigger Intent to Action inbound action. To learn how to enable and configure intent to action workflow to invoke the agentic workflow from inbound actions, see Enable intent to action workflow from inbound actions.

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- Set the *sn_uni_req.universal_request_portal* property value to **Supplier**. This step supports supplier user experience cases where a supplier email can't be automatically converted to a purchase order exception. Instead, a universal request is created in the Supplier Collaboration Portal and the supplier receives an email with a link to the universal request created. For the link to correctly direct the supplier to the Supplier Collaboration Portal, the *sn_uni_req.universal_request_portal* property value must be set to **Supplier**.

When a supplier sends an email to the configured email address, the Intent Executor Agent then implements the associated action based on the following conditions:

- If the email contains a purchase order line related information, a purchase order exception is created.
- If an email includes details for multiple purchase order lines, separate purchase order exceptions are generated for each line.
- If the email contains unclear information or questions not related to purchase order exceptions, a universal request is created.
- If the purchase orders and purchase order lines mentioned by the supplier can't be found in the system, a universal request is created.

The supplier receives an email notification when a purchase order exception or a universal request is created. A banner appears on purchase order exceptions created by the agentic workflow, indicating that an agent created them. The originating email content is added as an entry in the Activity stream, allowing operational buyers to review agent actions and flag any discrepancies.

Note:

- The supplier email must contain one of the following identifiers for the purchase order line:
  - ERP purchase order (PO) and ERP purchase order line (POL) IDs
  - ServiceNow® purchase order line number
  - ServiceNow® purchase order number when it contains only one line
- The workflow processes emails in any of these languages: English, French, Canadian French, German, Japanese, or Dutch.

Automated purchase order confirmation creation from emails

Emails sent by a registered supplier contact are automatically converted to purchase order confirmations by using the Email Intent to Action Agentic workflow.

The Email Intent to Action Agentic workflow analyzes incoming supplier emails, identifies the email intent, and executes associated actions using the Intent Identification and Intent Executor agents. For more information on the Email Intent to Action Agentic workflow, see Email Intent to Action Agentic Workflow.

This purchase order confirmation is in draft status and remains in this status for the confirmation draft review period. Suppliers can review the content of the confirmation and can either decide to submit it or retract it.

Prerequisites for automated creation of purchase order confirmations

To use this functionality, verify that the following steps are completed:

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- Configure the email inbox. You can use a general email instance or configure your SLO inbox. Make sure that a supplier contact is associated with the supplier and the email that will be used to send the purchase order confirmation.
- If you're using the SLO inbox, configure the [sn_supplier.slm_email] system property and edit the **Value** field to contain supplier email address. For more information, see Configure properties for Supplier Case Management.
- Purchase orders are associated with a specific supplier.
- (Optional) Modify the *sn_poem_core.draft_po_confirmation.auto_submit_hours* setting. This setting defines how much time the supplier has to review the purchase order confirmation while it is in draft status.

When a supplier sends an email to the configured email address, the agentic workflow implements the following actions:

1. The workflow starts processing the email content and transforms it into a purchase order confirmation draft record.
2. The draft confirmation is sent to the supplier for review.

   The supplier receives an email notification when a draft purchase order confirmation is created. A banner appears on purchase order confirmations created by the agentic workflow, indicating that an agent created them.

3. The supplier can take one of the following steps:
   - Reply to the draft confirmation email with Submit or Retract in the email body.
   - Review the draft confirmation in Supplier Collaboration Portal and submit it. The confirmation is then available to the buyer.
   - Review the draft confirmation in Supplier Collaboration Portal and retract it.

If the supplier does not take any action, the draft confirmation is auto submitted and is then available to the buyer. The default period for auto submission of a purchase order confirmation is 24 hours. However, the admin can change the default auto submission period by modifying the *sn_poem_core.draft_po_confirmation.auto_submit_hours* setting.

A banner appears on purchase order confirmations created by the agentic workflow, indicating that an agent created them. The originating email content is also added as an entry in the Activity stream.

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Note:

- For automatic confirmation to be generated, the supplier email must contain ERP purchase order (PO) and optionally ERP purchase order line (POL) ID. However, if you want to submit different responses for different PO lines, line IDs must be mentioned in the email.
- This workflow supports only as is confirmations, where the supplier accepts a PO line with full quantity and no further changes.
- When a supplier rejects a purchase order line or modifies the quantities or delivery date, a purchase order exception is generated.
- The workflow can generate automatic confirmation and exception for lines within a single purchase order. The PO line numbers to which each confirmation or exception response applies must be clearly specified in the email.
- If the purchase orders and purchase order lines mentioned by the supplier can't be found in the system, a universal request is created. A universal request is also created if the email text is not clear or relevant for purchase order confirmations or exceptions.

Identify and execute mitigation strategies for PO exceptions

Use the Define PO exception mitigation strategy workflow to resolve purchase order exceptions and avoid the risk of critical part shortages. This agentic workflow helps buyers identify and execute the best mitigation strategies by analyzing delivery gaps and proposing order changes with alternative suppliers.

Define PO exception mitigation strategy agentic workflow overview

The Define PO exception mitigation strategy agentic workflow analyzes purchase order exceptions and generates actionable mitigation strategies by calculating delivery gap schedules.

Accessing the define PO exception mitigation strategy agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Define PO exception mitigation strategy**.

Available agents

The following table lists the agents that are used in the Define PO exception mitigation strategy workflow.

AI agents used

AI agent	AI agent role
Purchase order plan creation AI agent	Analyzes purchase order exceptions and generates actionable mitigation strategies by calculating delivery gap schedules. It identifies alternative purchase order lines from different suppliers, and creates optimized change requests that combine supplier-suggested modifications with buyer-approved mitigation plans.

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Tools mapped to the Purchase order plan creation AI agent

Tools used in the Purchase order plan creation AI agent

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Create Change Requests	Creates Purchase Request (PR) records of type 'revision' to implement approved mitigation changes.
Scripts	Autonomous	Fetch Exception and Gap Schedule Details	Retrieves the purchase order exception details and delivery gap schedule.
Scripts	Autonomous	Get Editable Purchase Orders	Searches for alternative purchase order lines that can be modified to resolve delivery gaps.

Identify mitigation strategies for purchase order exceptions

The Define PO exception mitigation strategy workflow assesses the material delivery gap caused by an exception. It then identifies alternative suppliers with open lines for the affected product model and proposes order adjustments to mitigate the shortfall.

Before you begin

Role required: Fulfiller for ServiceNow Otto for POM [sn_poem_gen_ai_now_assist_fulfiller]

Users must be assigned this role alongside the Operational Buyer role to use this agentic workflow.

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Use any of the following steps:
   - Select the **Otto** button on any of the purchase order exception cards.
   - View a purchase order exception. Select the **Otto** button on the exception record.

   The ServiceNow Otto panel opens and the agentic workflow begins analyzing the exception and building a mitigation strategy by:
   - Outlining the material delivery gap caused by the exception.
   - Locating open purchase order lines with alternative suppliers for the same product model.
   - Recommending order adjustments that can help offset the shortfall.
4. Review the proposed solution and either accept it or request specific changes to the alternative supplier orders.

Result

The agentic workflow then creates the appropriate order revision (a purchase requisition of type Order Revision) reflecting the approved changes.

Explore Purchase Order Management

Learn about the benefits and capabilities of Purchase Order Management (POM).

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Purchase Order Management overview

Purchase Order Management simplifies the flagging of purchase orders issues and its resolution.

Purchase Order Management users

Users

User	Description
Supplier	Supplier reviews the purchase order, raises exceptions when order terms can't be met, and fulfills orders.
Purchase Order Management administrator	Purchase Order Management administrator is the local admin for the application and manages settings such as assignment rules and priority settings.
Operational Buyer	Operational Buyer can view, edit, and resolve purchase order exceptions. The buyer can also be assigned purchase order exceptions.
Purchase Order Management Viewer	Purchase Order Management Viewer can view purchase order exceptions but not be assigned to them and don't have access to Source-to-Pay Operations Workspace.
Purchase Order Management Collaborator	Purchase Order Management Collaborator can view, edit, and resolve assigned purchase order exception tasks.

Purchase Order Management Workflow

A workflow for a purchase order exception might progress as follows:

1. The supplier communicates and raises attention to issues related to purchase orders by submitting purchase order exceptions in Supplier Collaboration Portal.
2. The supplier can communicate different types of delivery plan changes. These include delivering in a single shipment on a different date, providing multiple smaller deliveries, or rejecting a purchase order line.
3. The operational buyer monitors the incoming exceptions and associated tasks.
4. The operational buyer can act on the assigned purchase order exceptions.
5. The operational buyer can update impacted order and accept a supplier proposal. Alternatively, the buyer can identify other open purchase orders with other suppliers delivering the same material in the same time frame.
6. The operational buyer can also create, assign, and monitor tasks from the purchase order exception record. The buyer can assign tasks both to internal procurement team members and collaborators outside the procurement team.
7. When stronger supplier support is required to resolve exceptions, operational buyers can create escalations to engage strategic buyers or other internal procurement stakeholders. A supplier case is created when an exception is escalated.

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Purchase Order Management benefits

Purchase Order Management benefits

Benefit	Feature	Users
Provide prompt visibility for the appropriate buyer by reporting delivery plan issues related to a purchase order.	Reporting delivery plan issues	Suppliers
Monitor and review purchase order exceptions from a centralized interface	POM landing page	Operational buyers
Expedite detection and resolution of purchase order exceptions.	Resolving purchase order exceptions	Operational buyers
Create and assign purchase order exception tasks to other buyers and collaborators	Create and assign a purchase order exception task	Operational buyers
Review and complete assigned purchase order exception tasks	• Work on a purchase order exception task • View a purchase order exception task	Operational buyers, Collaborators

What to explore next

To learn more about configuring and using Purchase Order Management, see:

- Configure Purchase Order Management
- Use Purchase Order Management
- Purchase Order Management reference

Source-to-Pay Workspace

The Purchase Order Management page in the Source-to-Pay Workspace enables you to manage and work on tasks related to purchase order exceptions.

The Source-to-Pay Workspace provides a Purchase Order Management dashboard and tools that enable you to do the following:

- Manage purchase order exceptions
- View and manage purchase order exception tasks
- Approve purchase order exceptions

The Source-to-Pay Workspace includes a landing page and a list view that enables you to work on various aspects of the purchase order exception management process.

For more information about Purchase Order Management landing page, see POM landing page.

For more information about Purchase Order Management list view, see POM list page.

For more information about the Source-to-Pay Workspace, see Source-to-Pay Workspace.

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End user and roles

End user and roles

End user and goal	Required role
Operational buyer: View and manage purchase order exceptions and tasks.	sn_poem_core.operational_buyer
Purchase order management viewer: View purchase order exceptions.	sn_poem_core.viewer
Purchase order management admin: Local admin for the application and its settings.	sn_poem_core.admin
Purchase order management collaborator: View assigned purchase order exceptions and tasks.	sn_poem_core.collaborator
Fulfiller for ServiceNow Otto for POM: Role assigned to an operational buyer to access ServiceNow Otto for Purchase Order Management (POM).	sn_poem_gen_ai_now_assist_fulfiller

Related topics

Explore Source-to-Pay Operations Workspace

POM landing page

POM list page

View a purchase order exception

As an Operational Buyer, view a purchase order exception in the Purchase Order Management landing page for further processing.

Before you begin
Role required: sn_poem_core.operational_buyer

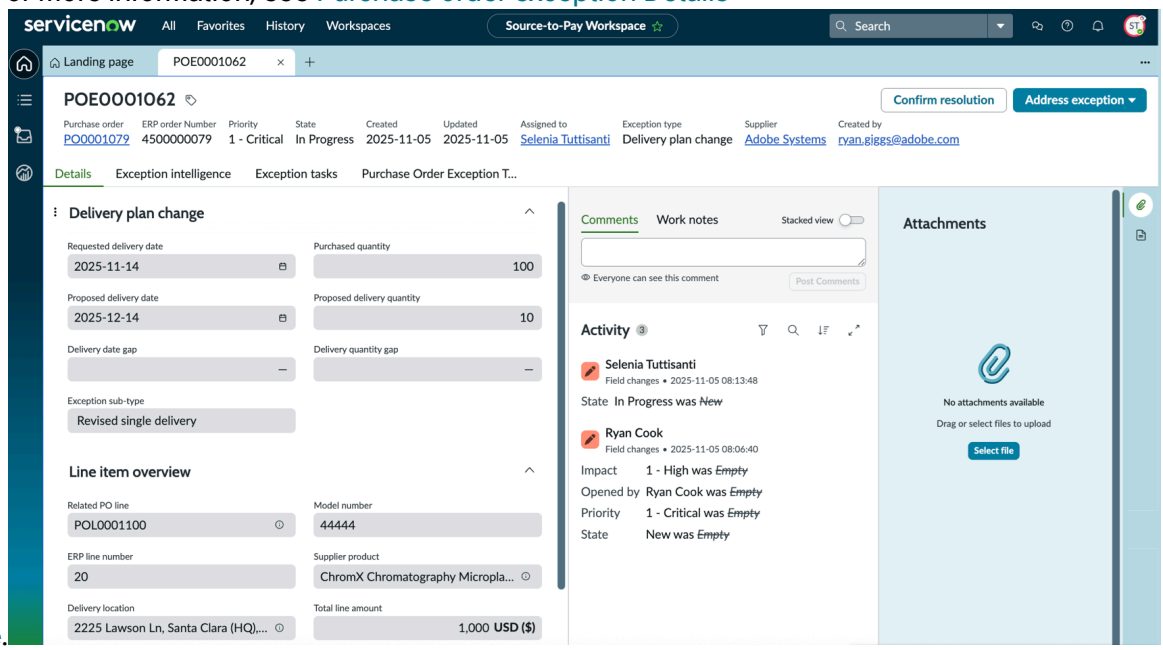
Procedure

1. Navigate to either of the following:
   - **All** > **Source-to-Pay Workspace**.
   - **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. In the Purchase Order Management page, select the List icon to open the List page.
4. From the list page, navigate to either of the following submodules:
   - **My work** > **Open purchase order exceptions**
   - **All work** > **Open purchase order exceptions**

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5. Select an exception number link from the Number column.

   The details of purchase order exceptions are displayed on the **Details** tab. For more information, see Purchase order exception Details page.



Related topics

Purchase order exception form

Purchase order exception form tabs

Purchase order exception Details page

The Details page is displayed when you select the link of a purchase order exception.

A purchase order exception refers to any discrepancy or problem that arises during the purchase order execution process such as:

- Price changes or surcharges: Supplier requests higher unit prices, unexpected freight duty, or handling fees.
- Goods receipt exceptions: Wrong material or lot received, or quality issues.
- Delivery plan exceptions: The supplier can't deliver the full quantity or on time, or can't deliver at all.

On the Purchase Order Management, navigate to **Lists** > **My work** > **Open purchase order exceptions**. Select a purchase order exception number link from the Number column to open the purchase order exception Details page. For a description of the field values, see Purchase order exception form.

Purchase order exception Details page

Option	Description
Multi-tab interface	For each purchase order exception, the details are displayed in tabs. For more information, see Purchase order exception form tabs.
Activity stream	Displays processing activities, comments, and changes to the state of the exception. You can

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Purchase order exception Details page (continued)

Option	Description
	filter activities by post types, field changes, and flagged activities.
Contextual side panel	Includes options to add attachments and templates related to the purchase order exception.

Note: Inactive purchase order exceptions are archived one year after their creation date and are not available for editing or action. Archived purchase order exceptions are permanently deleted after three years.

View a purchase order exception task

View the purchase order exception record in Source-to-Pay Workspace to take action on your assigned task.

Before you begin

Role required: sn_poem_core.viewer

Procedure

1. Navigate to either of the following:
   - **All** > **Source-to-Pay Workspace**.
   - **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. From the Incoming tasks or All tasks section, select a task.

Result

The purchase order exception task is displayed. Add comments or attachments as needed, and then mark the task complete.

Note: For tasks of the Upload Documents action type, the **Mark Complete** button is not available until a file is attached.

Related topics

Create and assign a purchase order exception task

Work on a purchase order exception task

View a purchase order confirmation

As an Operational Buyer, view a purchase order confirmation associated with a purchase order.

Before you begin

Role required: sn_poem_core.operational_buyer

Procedure

1. Navigate to either of the following:
   - **All** > **Source-to-Pay Workspace**.
   - **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.

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3. In the Purchase Order Management page, select the List icon to open the List page.
4. From the list page, navigate to either of the following submodules:
   - **Orders** > **Open orders**
   - **Orders** > **All purchase orders**
5. Select a purchase order from the Number column.
   The purchase order is displayed. The **Purchase Order Confirmations** tab shows the list of confirmations associated with this purchase order.
6. Select a purchase order confirmation from the Number column.
   You can view the confirmation details and associated confirmation lines.

Configure Purchase Order Management

Plan and configure your implementation for Purchase Order Management.

Install Purchase Order Management

If you have the admin role, install the Purchase Order Management application (com.snc.sn_poem_core). The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't 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 Purchase Order Management listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Install Sourcing and Purchasing Automation plugin (com.snc.sn_pr) before installing Purchase Order Management.
- Select **Load demo data** option when you install Sourcing and Purchasing Automation.

Role required: admin

About this task

The following items are installed with Purchase Order Management:

- Roles
- Tables

Procedure

1. Navigate to **Admin** > **Application Manager**.
2. Find the Purchase Order Management application (com.snc.sn_poem_core) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't 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.

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

Related topics

Explore Purchase Order Management

Assigning priority to a purchase order

Assigning purchase order exceptions to buyers

Components installed with Purchase Order Management

Several types of components are installed with the activation of the Purchase Order Management plugin, including roles and tables.

Roles installed

The following roles are installed with Purchase Order Management.

List of roles installed

Role title [name]	Description	Contains roles
Purchase Order Management Administrator [sn_poem_core.admin]	Can access all the features and capabilities of the Purchase Order Management application	• sn_shop.procurement_administrator • sn_poem_core.operational_buyer
Operational Buyer [sn_poem_core.operational_buyer]	Can be assigned purchase orders (PO) and also update assigned POs.	• sn_poem_core.viewer • sn_shop.procurement_specialist
Purchase Order Management Viewer [sn_poem_core.viewer]	Can view purchase orders	sn_fin.procurement_user
Purchase Order Management Collaborator [sn_poem_core.collaborator]	Can view, edit, and resolve assigned purchase order exception tasks	sn_poem_core.viewer

Tables installed

The following tables are installed with Purchase Order Management.

List of tables installed

Table	Description
Purchase Order Exception Task [sn_poem_exception_task]	Stores the purchase order exception tasks.
Purchase Order Exception [sn_poem_exception]	Stores the purchase order exception details.

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List of tables installed (continued)

Table	Description
Purchase Order Exception Split Line [sn_poem_exception_split_line]	Stores the details of split lines when a supplier submits a purchase order exception.
Purchase Order Confirmation [sn_poem_po_confirmation]	Stores the purchase order confirmation details.
Purchase Order Confirmation Line [sn_poem_po_confirmation_line]	Stores the details of purchase order confirmation lines.

Related topics

- Explore Purchase Order Management
- Assigning priority to a purchase order
- Assigning purchase order exceptions to buyers

Application plugin installation sequence in Purchase Order Management

View the consolidated list of plugins, high-level description of each plugin, and the dependencies that are required before installing each plugin in Purchase Order Management.

Application plugin list

Plugin name	Description	Dependencies
Sourcing and Purchasing Automation (com.snc.sn_pr)	Provides workflows and automation for sourcing requests, negotiations, and purchase requisitions.	• Source-to-Pay Common Architecture (com.snc.sn_shop) • Supplier Common Architecture (com.snc.sn_slm)
Purchase Order Management (com.snc.sn_poem_core)	Enables operational buyers and suppliers to flag purchase order issues and resolve them efficiently.	Sourcing and Purchasing Automation (com.snc.sn_pr)
Advanced Work Assignment for Source-to-Pay Operations (snc.sn_spend_awa)	Provides configurations to support automatic routing, queuing, and assignment of finance cases and emails.	Advanced Work Assignment (glide.awa)

Related topics

- Explore Purchase Order Management
- Assigning priority to a purchase order
- Assigning purchase order exceptions to buyers

Assigning priority to a purchase order

Purchase order exceptions are automatically assigned a priority level to indicate the most urgent issues.

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Priority assignment calculation is done by using the *Set Impact and Urgency fields for Priority* business rule. A business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Admins can use business rules to change values in form fields automatically when the specified conditions are met.

Priority is calculated by using the time remaining to resolve the exception before the requested delivery date (urgency) and the supplier's proposed delivery deviation from the order request (impact).

The Priority field for purchase order exceptions can have one of the following values: Critical, High, Moderate, and Low.

As an admin, you can configure the *Set Impact and Urgency fields for Priority* business rule to fit your business practices. To calculate impact and urgency level automatically based on the product model and supplier, use this business rule to create your own advanced configurations.

Related topics

Explore Purchase Order Management

Assigning purchase order exceptions to buyers

Use queues in Advanced Work Assignment to assign purchase order exceptions to the appropriate buyer.

You can use the following default queues:

- **Critical priority purchase order exceptions**
- **Moderate priority purchase order exceptions**

These queues are preconfigured to assign purchase order exceptions depending on their level of criticality.

Modify these existing queues or create a queue by selecting the purchase order exceptions channel. For information on configuring a queue, see Configure the Sourcing and Procurement Operations queues.

Related topics

Configure the Sourcing and Procurement Operations queues

Domain separation and Purchase Order Management

Domain separation is unsupported for Purchase Order Management. 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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Use Purchase Order Management

As a supplier, submit purchase order exceptions and work with operational buyers. Mitigate and resolve these issues efficiently.

Reporting delivery plan issues

Submit a request in the Supplier Collaboration Portal to create a delivery plan change.

A delivery plan change refers to modifications to the agreed-upon delivery terms and schedule specified in a purchase order. As a supplier contact, you can raise delivery plan change requests from the Supplier Collaboration Portal to modify the order quantity and delivery dates.

You can create a delivery plan change in one of the following ways:

- You can use **Raise a request** option from the Supplier Collaboration Portal header.
- You can use **Raise a request** option directly from a purchase order line in Supplier Collaboration Portal.

Related topics

Explore Purchase Order Management

Resolving purchase order exceptions

Raise a delivery plan change request

Submit a request in the Supplier Collaboration Portal header to create a purchase order exception.

Before you begin

Verify that the supplier is also present in the Supplier Contact [sn_slm_contact_m2m_supplier] table. This table stores information about supplier contacts and suppliers linked to them.

Role required: sn_slm.contact

Procedure

1. Navigate to Supplier Collaboration Portal home page by accessing your instance URL and adding a `/supplier` suffix.
   For example, `https://example.com/supplier`.
2. From the My Company drop-down list of suppliers associated with your profile, select the supplier.
3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Delivery plan change** catalog item.
5. On the Delivery plan change form, fill in the fields.
   For a description of the field values, see Delivery plan change form.
6. Select **Submit**.
   The application creates an exception and assigns it to the operational buyer.

Submit a delivery plan change request from a purchase order line

Submit a delivery plan change request directly from a purchase order line in the Supplier Collaboration Portal.

Before you begin

Verify that the supplier is also present in the Supplier Contact [sn_slm_contact_m2m_supplier] table. This table stores information about supplier contacts and suppliers linked to them.

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Role required: sn_slm.contact

Procedure

1. Navigate to Supplier Collaboration Portal home page by accessing your instance URL and adding a `/supplier` suffix.
   For example, `https://example.com/supplier`.
2. From the My Company drop-down list of suppliers associated with your profile, select the supplier.
3. From the My Active items list, select the purchase order lines count link.
4. From the list of purchase order lines, select a line.
5. On the purchase order line form, select **Raise an issue**.
   You can raise an exception only for your assigned purchase order line items that have a requested delivery date in the future, and where the state isn't Closed.
6. Select **Delivery plan change** as the exception type, and select **Submit**.
7. On the Delivery plan change form, fill in the fields.
   For a description of the field values, see Delivery plan change form.
8. Select **Submit**.
   The application creates an exception and assigns it to the operational buyer.

Related topics

Resolving purchase order exceptions

Delivery plan change form

Resolving purchase order exceptions

After an exception is flagged, you can access the exception details, which explains the issue and provides context about the purchase order line impacted. As the assigned Operational Buyer, you can collaborate with internal stakeholders and the supplier to help resolve the issue.

You can collaborate with internal stakeholders and the supplier to help resolve the issue. This collaborative process not only expedites the resolution of the order issue but also ensures all the work can be tracked, audited, and reported. Automated approval routing and notifications streamline the update process, integrating with Enterprise Resource Planning (ERP) systems on completion.

Related topics

Explore Purchase Order Management

Reporting delivery plan issues

Update a purchase order to accept supplier changes

After an exception is assigned to you, check the impacted purchase order and accept the supplier suggested changes.

Before you begin

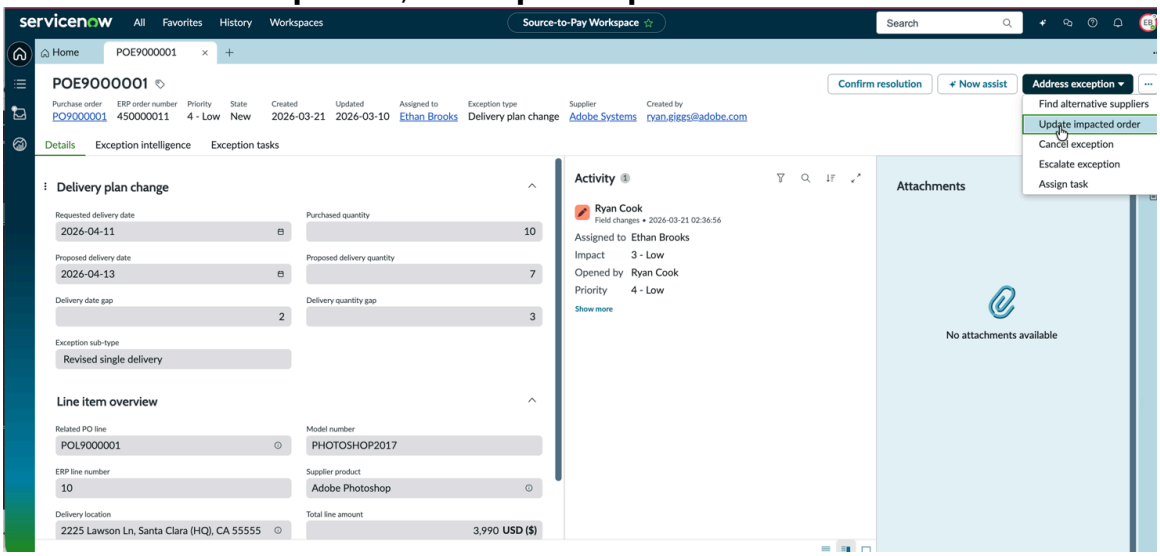
Role required: sn_poem_core.operational_buyer

Procedure

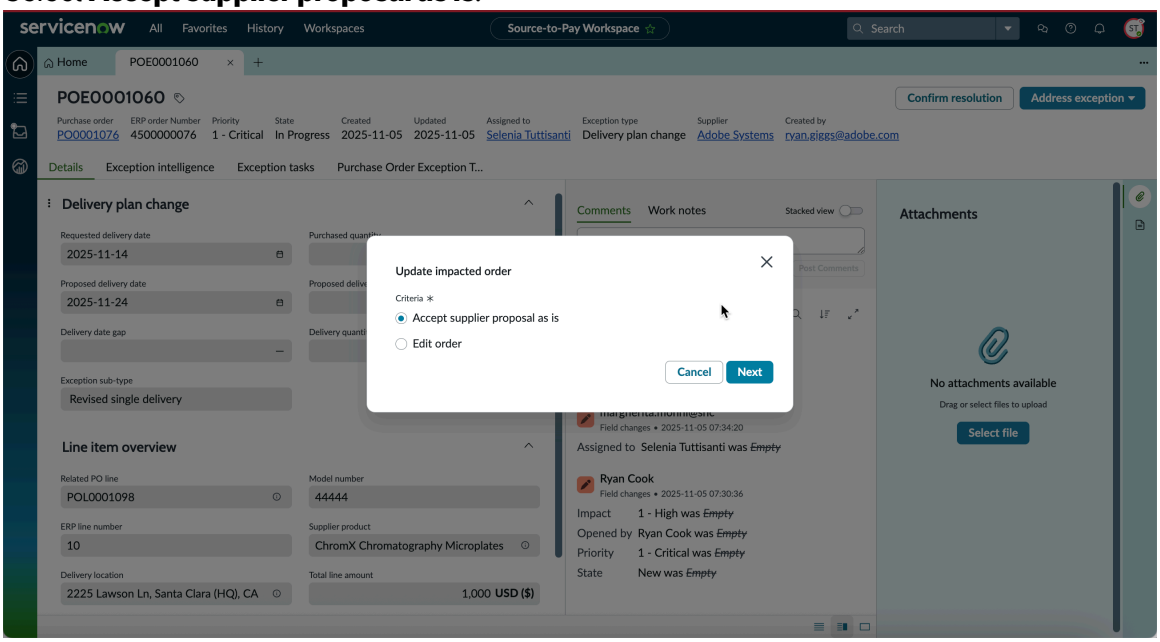
1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an open exception that you want to work on.

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4. From the **Address exception** list, select **Update impacted order**.



5. Select **Accept supplier proposal as is**.



Result

The supplier proposed changes to the quantity or delivery date, or both are updated in the purchase order. This purchase order revision can then be routed for approval.

Related topics

- Confirm a resolution for a purchase order exception
- View a purchase order exception task
- Create and assign a purchase order exception task

Update a purchase order to revise supplier suggested changes

After a purchase order exception is assigned to you, update the impacted purchase order by proposing changes that differ from the supplier's suggestions.

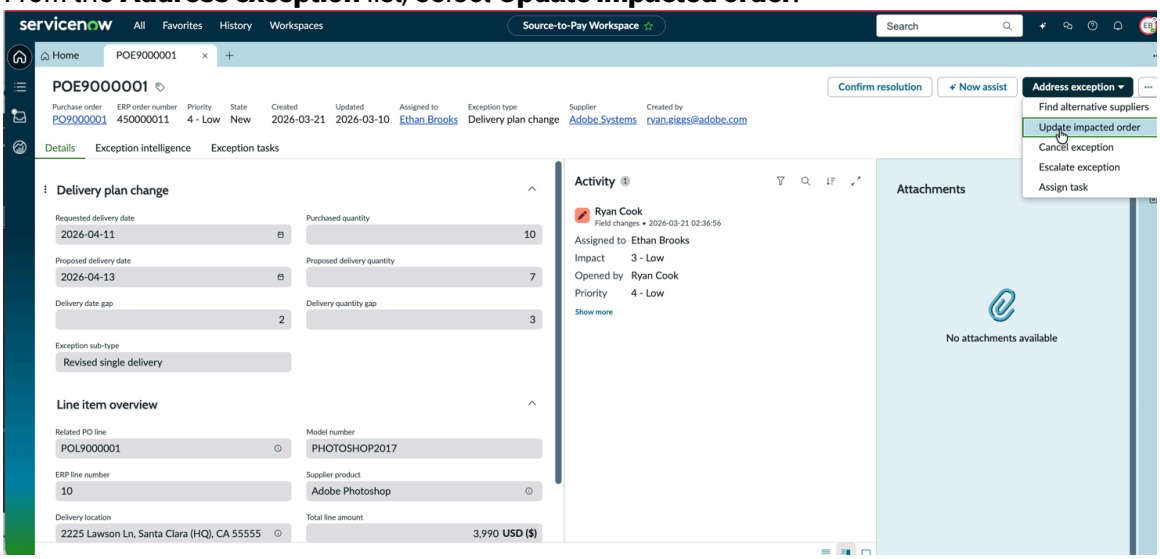
Before you begin

Role required: sn_poem_core.operational_buyer

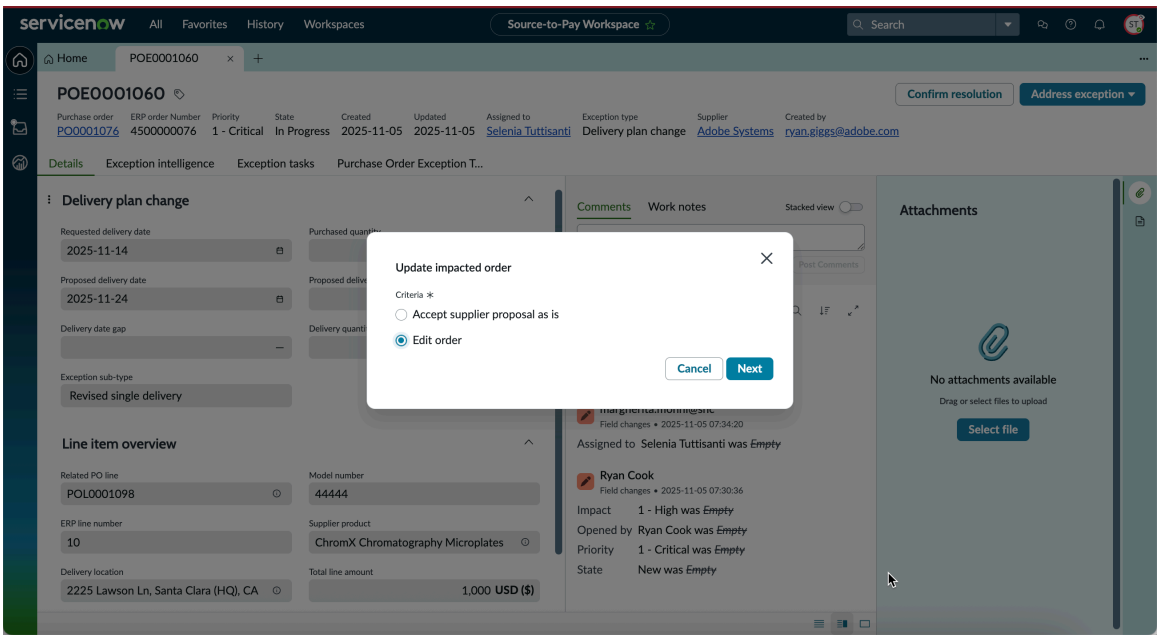
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Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an open exception that you want to work on.
4. From the **Address exception** list, select **Update impacted order**.

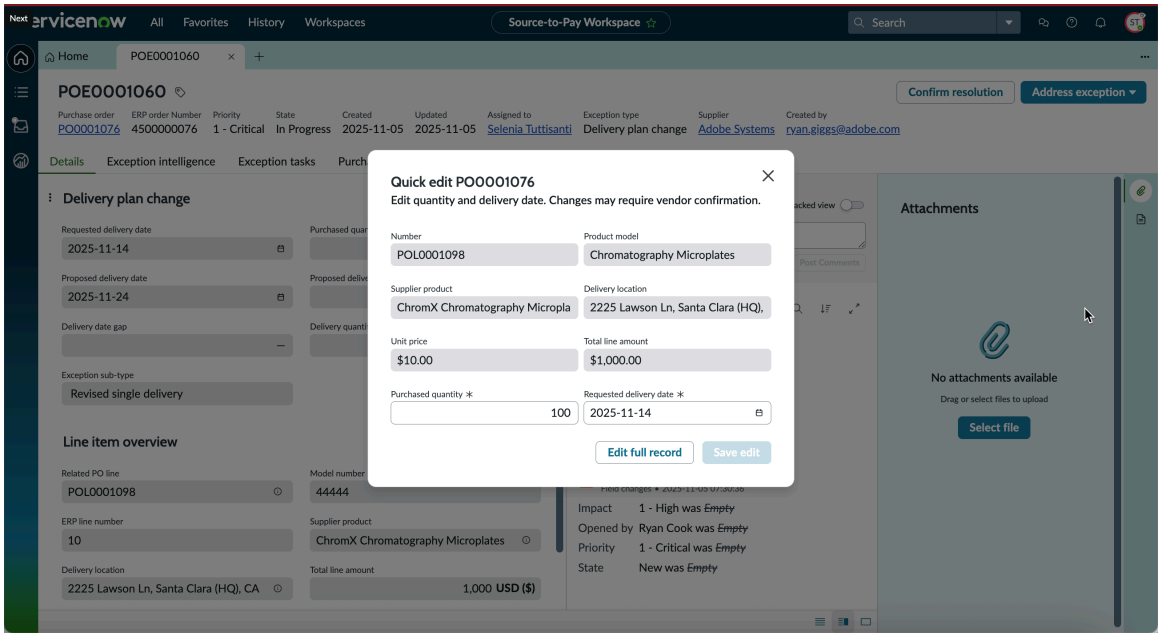


5. Select **Edit order**.



6. In the Quick edit window, update the purchased quantity or requested delivery date, or both.

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7. Select **Save edit**.
   .
8. **Optional:** To update more fields, select **Edit full record**.

Result

A purchase requisition of type Revision is created with your updates and is assigned to a reviewer for further action.

Related topics

- Confirm a resolution for a purchase order exception
- View a purchase order exception task
- Create and assign a purchase order exception task

Find alternative suppliers

If a supplier's inability to fulfill an order creates a shortfall, find an alternative supplier. Review open orders with other suppliers for the same material at the required location. You can then request for expedited delivery or increased quantities.

Before you begin

Role required: sn_poem_core.operational_buyer

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an open exception that you want to work on.
4. From the **Address exception** list, select **Find alternative suppliers**.
   The system displays open purchase orders with other suppliers for the same material as in the Product model field of the exception.
5. Select **Next**.
6. In the Quick edit window, update the purchased quantity, the requested delivery date or both.

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7. Select **Save edit**.
8. **Optional:** To update more fields, select **Edit full record**.

Result
A purchase order revision is created for the alternative supplier and is assigned to the supplier contact.

Related topics
- Confirm a resolution for a purchase order exception
- View a purchase order exception task
- Create and assign a purchase order exception task

Reassign a purchase order exception

Reassign an open purchase order exception to another operational buyer or team member. Reassign the exception when the original assignee is unavailable, when the original assignee lacks the necessary authority, or when the workload must be balanced. This ensures exceptions continue progressing toward resolution without delays.

Before you begin
Role required: sn_poem_core.operational_buyer

Procedure
1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.
4. Select the More Actions icon ( ).
5. Select **Reassign exception**.
6. In the Reassign exception window, specify the user in the **Assign to** field.
7. Select **Reassign**.
   The purchase order exception is reassigned.

Related topics
- Change the priority level of a purchase order exception
- Create a supplier escalation case from a PO exception

Change the priority level of a purchase order exception

Adjust the priority level of a purchase order exception to reflect its urgency and business impact. You can manage exceptions effectively by ensuring high-impact disruptions receive immediate attention while lower-risk issues are handled in appropriate sequence.

Before you begin
Role required: sn_poem_core.operational_buyer

Procedure
1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.

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4. Select the More actions icon ( ).
5. Select **Change priority level**.
6. In the Change priority level window, select the new priority level.
7. Select **Update**.
   The priority level of the purchase order exception is updated to reflect the new value.

Related topics

Assigning priority to a purchase order

Confirm a resolution for a purchase order exception

Confirm a resolution for a purchase order exception. You can close the purchase order exception when all necessary actions are complete.

Before you begin

Role required: sn_poem_core.operational_buyer

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.
4. Select **Confirm resolution**.
5. In the Confirm resolution dialog, enter comments.
6. Select **Submit**.
   The purchase order exception is marked as closed.

Related topics

View a purchase order exception task

Create and assign a purchase order exception task

Create and assign a purchase order exception task

Create a task associated with a purchase order exception and assign it to an operational buyer or collaborator. You can track the task status from the purchase order exception.

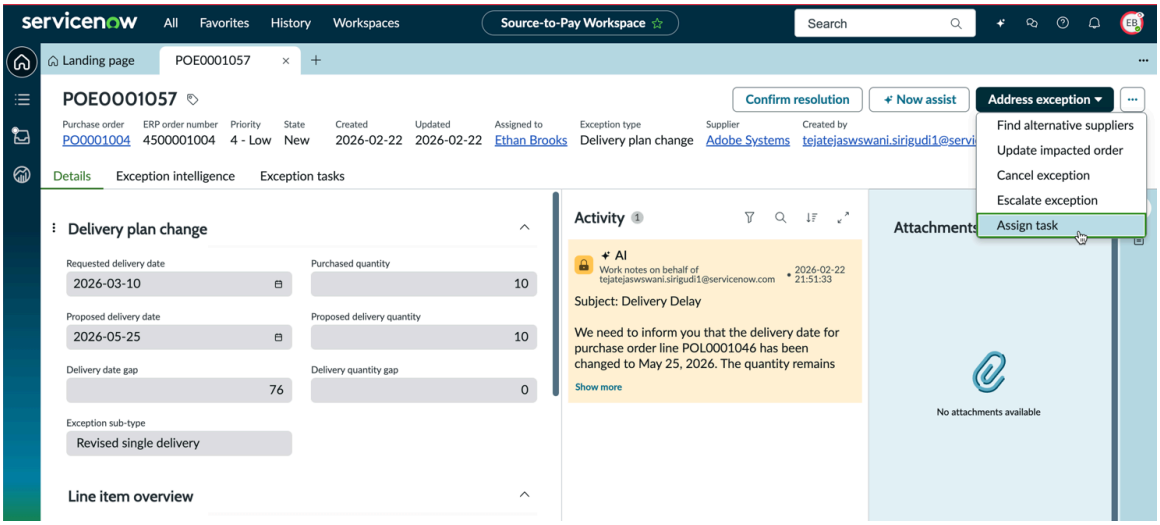
Before you begin

Role required: sn_poem_core.operational_buyer

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.
4. From the **Address exception** list, select **Assign task**.

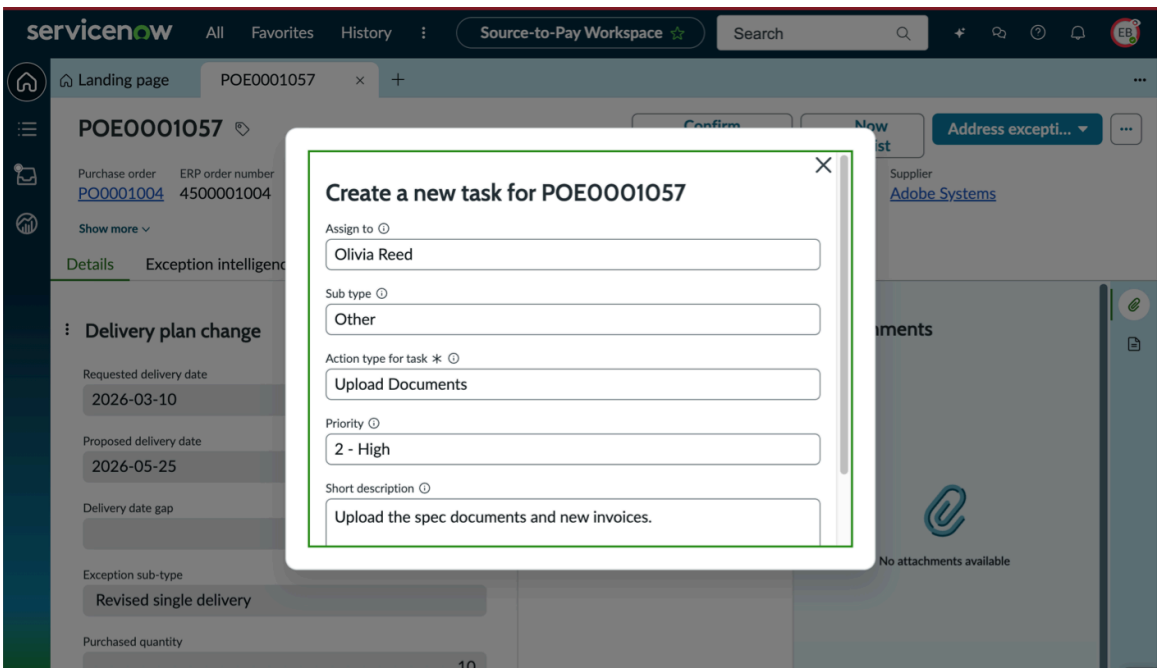
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5. On the form, fill in the fields.

Create a task form

Field	Description
Assign to	Name of the buyer or collaborator.
Sub type	Type of task being assigned.
Action type for task	Action to be performed for the task.
Priority	Urgency level assigned to the task.
Short description	Short description of the task.



6. Select **Create**.
A purchase order exception task record is created.

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7. Update the record if needed and select **Submit task**.

Note:

To activate the **Submit task** button, complete the **Action type**, **Sub type**, and **Assign to** fields, then save your changes.

Result

The task is assigned to the assignee. You can't make any changes to the record until the assignee completes the task.

Related topics

View a purchase order exception task

Work on a purchase order exception task

Create and assign a purchase order exception task

Work on a purchase order exception task

View a purchase order exception task record to take action on your assigned task.

Before you begin

The Source-to-Pay Workspace is not accessible to users who have the sn_poem_core.collaborator role.

Role required: sn_poem_core.collaborator

Procedure

1. Navigate to either of the following:
   - **All** > **Employee Center** > **My active items** > **Tasks**.
   - The Review your work section on the home page.
2. Select a task.
   The purchase order exception task record is displayed.

What to do next

Review the task, add comments and attachments as needed, and then mark the task complete.

Note: For tasks of the Upload Documents action type, the **Mark Complete** button is not available until a file is attached.

Related topics

Work on a purchase order exception task

View a purchase order exception task

Create and assign a purchase order exception task

Create a supplier escalation case from a PO exception

Create a supplier escalation case from the purchase order (PO) exception record to engage procurement team members and resolve supplier issues faster.

Before you begin

Role required: sn_poem_core.operational_buyer

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Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.
4. From the **Address exception** list, select **Escalate Exception**.
5. In the Request escalation window, enter a description.
6. Select **Submit**.

Result

A supplier case is created. You can also track this supplier case from the Cases section of the Exception Tasks table.

Related topics

Reporting delivery plan issues

Cancel a purchase order exception

Cancel a purchase order exception that is incorrectly filled or no longer required.

Before you begin

Role required: sn_poem_core.operational_buyer

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the **Purchase order management** tab.
3. Select an exception that you want to work on.
4. From the **Address exception** list, select **Cancel exception**.
5. Select **OK**.
   The purchase order exception is canceled.

Related topics

Reporting delivery plan issues

Create purchase order exception from Universal Request

Operational buyers can convert universal requests into purchase order exceptions during triage, cutting down on manual effort and ensuring that purchase order related issues are tracked and resolved more efficiently.

Before you begin

Role required: Operational buyer

- You must have the following plugin installed: Universal Request for Source-to-Pay Operations Plugin [sn_fsc_ur_common].
- You must enable the Universal Request functionality.
- You must maintain users in the Purchase Order Management Universal Request Group associated with the universal request service set.

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Procedure

1. Navigate to **All** > **Source-to-Pay workspace**.
2. Select the list icon.
3. Navigate to **Universal request** > **All**.
4. Select a Universal Request.
5. Select **Create purchase order exception**.
6. In the Create New Purchase Order Exception form, fill in the details.
   For a description of the field values, see Create new purchase order exception form.

   The universal request number from which the purchase order exception is created appears in the **Universal Request** field on the purchase order exception form.
7. Select **Save**.

Result
A purchase order exception record is created, which links to the original universal request.

Related topics

Universal Request

Create new purchase order exception form

Managing purchase order confirmations

As a supplier, create and review purchase order confirmations in the Supplier Collaboration Portal.

A purchase order confirmation is a supplier's formal response to a purchase order. It indicates whether the supplier can fulfill the order as requested with the specified delivery quantities and dates.

Purchase order confirmations give buyers clear visibility into supplier commitments and delivery timelines, helping them make informed procurement decisions and adjust schedules accordingly.

A purchase order confirmation can be created by the supplier in one of the following ways:

- Supplier Collaboration Portal
- Automated purchase order confirmation creation from supplier emails

Create a purchase order confirmation in Supplier Collaboration Portal

Create purchase order confirmations to accept PO lines without modifications and assure the buyer of timely order fulfillment.

Before you begin
Verify that the supplier is also present in the Supplier Contact [sn_slm_contact_m2m_supplier] table. This table stores information about supplier contacts and suppliers linked to them.

Role required: sn_slm.contact

Procedure

1. Navigate to Supplier Collaboration Portal home page by accessing your instance URL and adding a `/supplier` suffix.
   For example, `https://example.com/supplier`.

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2. From the My Company drop-down list of suppliers associated with your profile, select the supplier.
3. From the My Active items list, select the purchase orders count link.
4. From the list of purchase orders, select one.
5. On the purchase order form, select **Respond to lines**.
   All lines related to a PO are displayed, except those with active PO exceptions or those already confirmed.
6. Select the lines you want to confirm and select **Continue to confirmation**.
7. Review the lines and select **Submit confirmation**.

Result

The status of each purchase order line changes from Draft to Confirmed after submission. Once a confirmation is submitted, it can't be edited or canceled and is also visible to the operational buyer.

Review purchase order confirmations

Review the draft purchase order confirmation generated via email by the agentic workflow.

Before you begin

Role required: sn_slm.contact

Procedure

1. Open the draft confirmation email that you have received.
2. Select **Review draft confirmation** in the email to view the purchase order confirmation in Supplier Collaboration Portal.
3. To finalize a draft confirmation, select one of these options in the email or the purchase order confirmation in Supplier Collaboration Portal:
   - **Submit** — Sends the purchase order confirmation to the buyer.
   - **Retract** — Discards the draft confirmation.

   By default, draft confirmations auto-submit after 24 hours if no action is taken. However, the admin can change the default auto submission period.

Related topics

Automated purchase order confirmation creation from emails

View a confirmation in Supplier Collaboration Portal

As a supplier contact, view a purchase order confirmation in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to Supplier Collaboration Portal home page by accessing your instance URL and adding a `/supplier` suffix.
   For example, `https://example.com/supplier`.
2. From the My Company drop-down list of suppliers associated with your profile, select the supplier.
3. From the My Active items list, select the purchase order confirmations count link.

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You can view all purchase order confirmations that you have created and have access. By default, the list shows the confirmations in draft status. Clear the status filter to see all confirmations.

4. From the list of purchase orders, select one.
   For a description of the field values, see Purchase order confirmation form.

Integrate with Purchase Order Management

Extend the capabilities of Purchase Order Management by integrating with other applications.

Purchase Order Management Integrations

Purchase Order Management (POM) supports the following integrations:

Purchase Order Management integration with SupplyOn

The Purchase Order Management integration with SupplyOn sends purchase orders from your ServiceNow instance to the SupplyOn Supply Chain Collaboration portal. It returns processing status updates and retrieves supplier confirmations into ServiceNow, enabling buyers and suppliers to collaborate on the same order information.

For more information, see Purchase Order Management integration with SupplyOn.

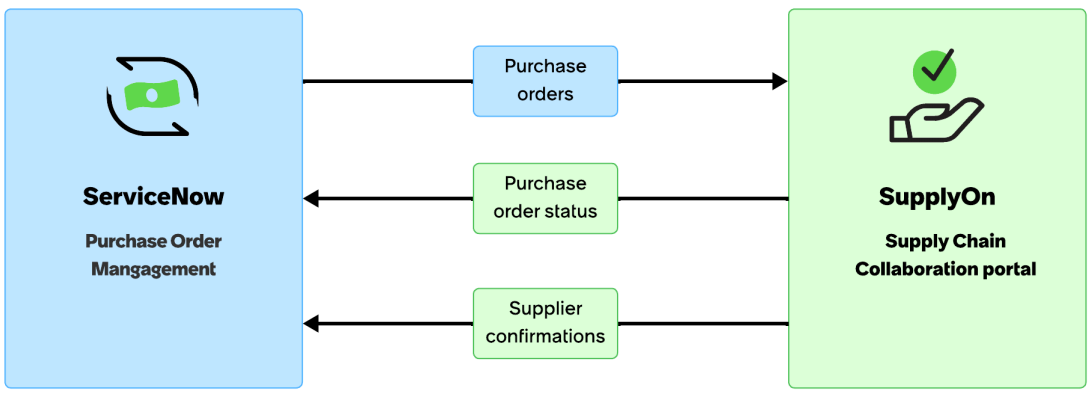
Purchase Order Management integration with SupplyOn

The Purchase Order Management integration with SupplyOn sends purchase orders from your ServiceNow instance to the SupplyOn Supply Chain Collaboration portal. It returns processing status updates and retrieves supplier confirmations into ServiceNow, enabling buyers and suppliers to collaborate on the same order information.

The integration sends purchase orders from your ServiceNow instance to SupplyOn and receives the asynchronous processing outcome for each order. It also pulls supplier line-level confirmations back into the ServiceNow platform.

The integration is delivered as a single scoped application and plugin (scope `sn_supplyon_po`, Purchase Order Management Integration with SupplyOn). It builds on two ServiceNow® frameworks that must already be present on the instance: the Source-to-Pay (S2P) integration framework and the ERP integration framework.

Purchase Order Management integration with SupplyOn



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Key features

- Send standard purchase orders to SupplyOn automatically when an order is created, revised, or canceled, including header attachments and line-level cancellation.
- Correlate the status responses that SupplyOn returns asynchronously to the original purchase order by transaction identifier, including late callbacks.
- Retrieve line-level supplier confirmations on a schedule, using incremental windowing so that no supplier responses are missed.
- Track the purchase order status end to end on the staging records, and raise an error task when a failure occurs, without creating duplicate tasks.
- Tailor the outbound purchase order payload through an extension point, without modifying the shipped code.

What the integration doesn't send

The integration applies the following send restrictions:

- Blanket orders — SupplyOn receives only the primary order. For more information, see SupplyOn integration limitations.
- Service lines (product type 20) and handling-fee lines (30). For more information, see SupplyOn outbound purchase order request mapping.
- Line-level attachments — Attachments are sent at header level only. For more information, see SupplyOn outbound purchase order request mapping.

Integration streams

The integration consists of three streams that together form one closed collaboration loop.

1. Outbound send (push, outbound): When the existing Purchase Order Management flow writes an outbound purchase order staging record routed to SupplyOn, the integration pushes the order to the SupplyOn `POST /purchaseorder` API. The integration then records the returned transaction ID for correlation.
2. Async status callback (push, inbound): The synchronous response from SupplyOn confirms transport receipt only. SupplyOn sends the actual processing outcome later as an asynchronous status notification to a receiver endpoint that the integration hosts. The integration correlates the notification to the outbound staging row by transaction ID and advances the row status.
3. Confirmation pull (pull, inbound): On a schedule, the integration pulls the supplier line-level confirmations through `GET /demandresponse-summaries` and `GET /demandresponse`, then lands them in the inbound confirmation staging tables.

Streams at a glance

Stream	Direction	Mechanism	Trigger	SupplyOn API	Lands in
Outbound send	Outbound (push)	Flow to subflow to REST step	Outbound staging row reaches New (10)	POST / purchaseorder	Transaction ID correlation token o the staging header
Async status callback	Inbound (push)	REST API asynchronous	SupplyOn posts to the	SupplyOn calls the integration	Outbound staging header and lines, status 30 or 40

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Streams at a glance (continued)

Stream	Direction	Mechanism	Trigger	SupplyOn API	Lands in
		flow trigger to subflow	receiver endpoint		
Confirmation pull	Inbound (pull)	Scheduled ERP-framework subflow to REST steps	SupplyOn schedules the pull (default approximately 24 hours), or a job runs manually	GET / demandresponse-summaries then GET / demandresponse	sn_fcms_intg_imp_po_confirmatio and _line staging

How it works

Flows and subflows provide a plug-and-play experience for the integration scenarios. Integration Hub actions provide the building blocks for the Purchase Order Management subflows and connect to SupplyOn through REST APIs.

The SupplyOn source is modeled as an ERP source and uses the standard purchase order, legal entity, ERP source, integration source, and connection pattern.

When a purchase order is routed to SupplyOn, a flow sends the order to the SupplyOn purchase order API. SupplyOn returns the processing status asynchronously to an endpoint that the integration hosts, and the integration updates the order status. On a schedule, a subflow retrieves the supplier confirmations from SupplyOn.

SupplyOn integration prerequisites

Before configuring the SupplyOn integration, review the application dependencies, data requirements, and configuration sequence.

Application and framework dependencies

- Application: Activate the Purchase Order Integration with SupplyOn application (scope `sn_supplyon_po`).
- S2P integration framework: The S2P integration framework (tables prefixed `sn_spend_intg_`) must be present. It provides the outbound staging tables, the integration-status life cycle, and the integration error tasks.
- ERP integration framework: The ERP integration framework (tables prefixed `sn_fin_` and `sn_fcms_intg_`) must be present. It provides source configuration and subflow scheduling.

Main data and configuration sequence

Before any purchase order can complete a round trip, the following configuration and primary data must exist on the ServiceNow instance and in SupplyOn. Complete these items in order.

1. Connection and credential aliases for the target environment (QAS or PRD), with valid SupplyOn API Management (APIM) subscription keys. For more information, see Configure the connection and credential aliases.
2. ERP source and integration source routing records: An active `sn_fin_erp_source` paired with an `sn_fcms_intg_source` whose connection points at the SupplyOn Orders alias. See Configure the SupplyOn source system.

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3. Supplier primary records (`sn_fin_supplier`) that carry the ServiceNow supplier number (the SUP... value) in the number field. This value is the routing-triple supplier number.
4. Legal entity to ERP source routing (`sn_fin_legal_entity.erp_source`) so that the Purchase Order Management flow stamps the SupplyOn ERP source onto each order outbound staging row.
5. Routing-triple constants: The organization code and plant code, set as system properties. See Configure the routing triple and payload properties.
6. Supplier registration in SupplyOn for the buyer routing triple. The supplier self-registers when it receives its first order. In the SupplyOn base system, the registration invitation is valid for six days. If the supplier doesn't register within that time, SupplyOn returns an error.
7. Async receiver endpoint registered in SupplyOn, plus the inbound service-account credential that SupplyOn uses to authenticate. For more information, see Register the async receiver endpoint in SupplyOn.

Note: The ERP source record name does not affect routing. Outbound eligibility is determined by the connection-alias scope prefix (`sn_supplyon_po`), not by the record name, so you can name the ERP source to suit your landscape as long as it is wired to the SupplyOn Orders alias and the legal entity routes to it.

SupplyOn integration architecture and processing

The outbound send, async status callback, and confirmation pull streams process purchase orders. The connection model defines how environments and credentials are structured.

Both outbound streams move the Purchase Order Management outbound staging records through the framework integration-status life cycle. The header (`sn_spend_intg_outbound_purchase_order`) and its lines (`sn_spend_intg_outbound_purchase_order_line`) move in lockstep. For the status values, see SupplyOn integration status values.

Connection model and environments

- One logical connection, two keys: Every call targets the same SupplyOn host. SupplyOn exposes the orders endpoint and the demand-response endpoint under two separate APIM products, each with its own subscription key. A single connection and credential alias uses one key at a time, so the integration defines two aliases (`supplyOnOrders` and `supplyOnDemandResponse`) that differ only in their key. Both use the same host and the same header name (`Ocp-Apim-Subscription-Key`).
- Alias REST action binding: Each alias is wired directly into the specific Integration Hub REST steps that call its endpoint. There is no per-call connection resolution.
- Connection selection: The `sn_fcms_intg_source` record carries a single connection reference, which is used only for the outbound orders side (routing and the eligibility gate scope check). The demand-response side is bound at the action level. Dynamic multi-connection selection is not supported by the single-connection framework model against a two-key API.
- Environment (QAS and PRD): The connection URL and subscription keys are environment-specific runtime data configured on each instance after deployment. The application defines only the alias records and a setup wizard. To move between environments, re-point the two aliases rather than adding connections.
- Tenant identity: The buyer identity in SupplyOn is the routing triple: organization code, plant code, and supplier number. See Configure the routing triple and payload properties.

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Outbound send processing

A record trigger on the outbound header (condition `status=10`, trigger strategy Once) fires when a row reaches New. This trigger is distinct from the framework dispatch trigger and is deliberately status-only, so it fires for every ERP source. An in-flow eligibility gate then decides whether the row belongs to SupplyOn. The gate keys off the connection-alias scope prefix (`connection.id STARTSWITH sn_supplyon_po`) rather than the ERP source name, making routing portable across instances.

The gate applies two checks:

1. SupplyOn-routed: The order routes to an `sn_fcms_intg_source` whose connection scope prefix is `sn_supplyon_po` and that is active.
2. Not a release order: The order is resolved by number on `sn_shop_order`. If its `blanket_order` reference is populated, the row is a blanket release order (a child of a primary) and is skipped, because SupplyOn receives only the primary order.

For the detailed step sequence and status transitions, see SupplyOn subflows and actions.

Async status callback processing

The receiver front door is a Flow Designer flow that uses the Integration Hub REST API asynchronous trigger (`rest_async`). Activating the flow auto-creates the HTTP endpoint, owns platform authentication, and exposes the request body as data pills. The flow maps the raw request body into a subflow that correlates the callback to the outbound staging row and advances its status. This path uses no staging table or transform map, because the callback is a pure processing acknowledgment, not line data.

The callback is stateless per call and uses no job tracker: correlation is entirely off the transaction ID token carried on the staging row. A re-delivered callback re-applies the same status (idempotent), and the flow returns HTTP 200 on any well-formed handled call, including a no-match, to prevent SupplyOn retry storms.

Confirmation pull processing

A subflow registered against the SupplyOn ERP source configuration pulls supplier confirmations on demand. The integration doesn't provide a default schedule, so you run the job from the source configuration whenever you want to retrieve confirmations. It calls `GET /demandresponse-summaries` for the look-back window, then `GET /demandresponse` per order, and lands each line-level confirmation in the inbound confirmation staging tables. This is the standard staging pattern: spoke action, staging table, then a customer or framework transform into the core target table.

Each run queries a configurable window (default equals the schedule interval) with a small overlap for safety. The integration persists a high-water mark (`lastResponseDate`) so that re-runs neither miss nor double-count confirmations. The integration handles empty windows as a clean no-op success.

Callback and confirmation separation

The SupplyOn status notification schema is a pure status acknowledgment: `uuid`, `status`, and an optional list of errors. Real supplier confirmations (confirmed quantity, date, price, changes requested, or rejections) are available only through the confirmation pull. This keeps the boundary clean: the push tells you whether SupplyOn accepted the order, and the pull tells you what the supplier decided about the lines.

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SupplyOn integration status values

The integration-status values that the outbound staging header and lines move through, and which component sets each value.

Both outbound streams move the Purchase Order Management outbound staging records through the framework integration-status life cycle. The header (sn_spend_intg_outbound_purchase_order) and its lines (sn_spend_intg_outbound_purchase_order_line) move together.

Integration status values

Status	Meaning	Set by
5	Draft	The existing Purchase Order Management flow, before this integration is involved.
10	New	The existing Purchase Order Management flow, when it writes the outbound staging row. This is the outbound trigger event.
20	In process	The send subflow, immediately before POST /purchaseorder (header and lines).
30	Processed	The async status callback, on status OK.
40	Failed	The send subflow (synchronous non-201 or callback timeout) or the async callback (status ERROR).

Cost allocation

The related sn_spend_intg_outbound_cost_allocation table (buyer-side financial coding) carries its own *erp_integration_status* field with the same values. Cost-allocation rows are not sent to SupplyOn. The integration keeps them in sync with parent order transitions so they don't remain open after the order closes.

SupplyOn subflows and actions

The flows, subflows, and actions that make up the integration, and the outbound send step sequence.

The integration is delivered as a set of flows, subflows, and Integration Hub actions.

Integration components

Type	Name	Purpose
Flow	SupplyOn Outbound PO - Create/Update/ Cancel	Fires when an outbound header reaches New (10). Runs the eligibility gate and invokes the send subflow.
Subflow	SupplyOn Outbound PO - Send	Builds and posts the order to SupplyOn, stamps the correlation token, and waits for the async outcome. Runs as system.
Action	Post SupplyOn Purchase Order	Posts POST /purchaseorder through the supplyOnOrders alias.
Flow	SupplyOn Outbound PO - Async Callback	REST API asynchronous trigger. Hosts the receiver endpoint and maps the request body into the callback subflow.

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Integration components (continued)

Type	Name	Purpose
Subflow	SupplyOn Async Callback - Handle Status	Correlates the notification to the outbound row and advances its status. Runs as system.
Subflow	Get Order Confirmation from SupplyOn	Scheduled pull of line-level confirmations into inbound staging.
Action	Get demand-response summaries	Lists orders with confirmations in the look-back window (GET /demandresponse-summaries).
Action	Get demand-response detail	Retrieves per-line confirmation detail for one order (GET /demandresponse).

Outbound send: step sequence

The send subflow moves the row through the following steps and status transitions.

1. Resolve the operation: The resolver returns create or cancel, never update, because SupplyOn owns insert-versus-update. Cancel is returned when the source purchase order header or any line is in a canceled or pending-cancellation state.
2. Move the header and lines to 20 (In process): This happens before the POST, so a row can't sit at 20 without the send having started.
3. Build the payload: The factory maps the staging header and lines into the SupplyOn JSON. It also maps the source purchase order for attachments, applies the routing triple, embeds header attachments, and runs the scripted extension point.
4. Invoke Post SupplyOn Purchase Order: The REST step posts the order and reads back the status code and the synchronous response (TransactionID, StatusCode, StatusText).
5. Handle the synchronous outcome: On a non-201, the header and lines move to 40 (Failed), the message is set to the error detail, and the flow ends without waiting. On a 201, the header message is stamped with the SON-TXN:<TransactionID> token and a note that the order was sent and is awaiting the async status. The status stays at 20.
6. Wait up to 24 hours for the status to change from 20: On timeout, the header and lines move to 40 and the correlation token is preserved so that a late callback can reconcile the row to 30. If the callback has already arrived, the async path has set 30 or 40 and the send subflow does not rewrite the status.

Note: This subflow writes 20 and 40 (synchronous failure or timeout). It does not write 30. Setting status 30 is the async callback job.

Cost-allocation lockstep: At each transition, the integration mirrors the status onto any `sn_spend_intg_outbound_cost_allocation` rows for the order, so that buyer-side cost-allocation records don't remain open after the order closes. Because the cost-allocation table has no foreign key to the outbound header, correlation is by the order line numbers. These rows are not sent to SupplyOn.

Custom extension point: The outbound send provides a scripted extension point for payload adjustment. The confirmation pull does not currently define one.

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Configuring the Supplyon integration

Configure the connection and credential aliases, source system routing, routing triple, inbound authentication, receiver endpoint, and confirmation pull that connect your ServiceNow instance to SupplyOn.

Configure the connection and credential aliases

Configure the two connection and credential aliases with the SupplyOn host and subscription keys for your environment.

Before you begin

SupplyOn has issued two APIM subscription keys, one for the orders product and one for the demand-response product. You have the SupplyOn gateway host URL for your environment.
Role required: admin

About this task

The integration defines two connection and credential aliases. Configure the connection URL and API key on each alias for your environment. These values are runtime data and aren't stored in source.

Connection and credential aliases

Alias	Name on the instance	Purpose	Base path
supplyOnOrders	SupplyOn Product SCC Interfaces for Customer subscription	Outbound POST / purchaseorder	/scc/order/v1
supplyOnDemandResponse	SupplyOn Product SCC Public APIs subscription	Inbound GET / demandresponse and / demandresponse-summaries	/scc/demandresponse/v1

Connection settings

Field	Value
Connection type	HTTP connection (http_connection)
Host	The SupplyOn gateway host for the environment (a separate host is used for PRD).
Credential type	API key (api_key_credentials)
Auth header	Ocp-Apim-Subscription-Key (both aliases, two distinct key values).
Setup wizard	SupplyOn PO, API Key. Prompts for connection name, connection URL, and API key.
Secret storage	Credential store only. No key values are committed to source.

Procedure

1. Navigate to **Connections & Credentials** > **Connection & Credential Aliases**.
2. Open the *`supplyOnOrders`* alias.

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Use the setup wizard to enter the connection name, the connection URL (the SupplyOn gateway host for your environment), and the orders subscription key. The key is stored in the credential store.

3. Open the *supplyOnDemandResponse* alias and enter the same connection settings and the demand-response subscription key.
4. Test the connection through the orders alias.

   A test `POST /purchaseorder` through the orders alias returns HTTP 201 on success.

What to do next

Note: Both aliases reference the out-of-box Default HTTP Retry Policy. See SupplyOn error handling and retry.

Configure the SupplyOn source system

Confirm the ERP source and integration source records that route purchase orders to SupplyOn.

Before you begin

Role required: admin

About this task

The SupplyOn source is modeled as an ERP source. It shares the same purchase order, legal entity, ERP source, integration source, and connection pattern as the SAP, Oracle, Ariba, and Coupa integrations. It does not use the cXML punchout model. The application includes two configuration records as application data.

Source configuration records

Table	Record	Key fields
sn_fin_erp_source	SupplyOn	`source = "SupplyOn"`, `active = true`
sn_fcms_intg_source	SupplyOn	`name = "SupplyOn"`, fin_erp points at the ERP source, `inactive = false`, connection points at the supplyOnOrders alias

Procedure

1. Confirm the ERP Source [sn_fin_erp_source] record (source SupplyOn, active) exists.
2. Confirm the Integration Source [sn_fcms_intg_source] record exists, with *fin_erp* pointing at the ERP source, *inactive* cleared, and *connection* pointing at the *supplyOnOrders* alias.
3. Verify that each legal entity that routes to SupplyOn has its *erp_source* set to the SupplyOn ERP source.
4. Confirm the child Integration Service [sn_fcms_intg_service] row that registers the confirmation subflow against the integration source record.

Configure the routing triple and payload properties

Set the organization code, plant code, and payload constant system properties that identify the buyer tenant in SupplyOn.

Before you begin

Role required: admin

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About this task
The routing triple identifies the buyer tenant in SupplyOn. Resolve each element as follows.

Routing triple resolution

Element	Value	Source
OrgCode	The org_code_override property if set, otherwise plus the app creator company code.	System property or app creator company code.
PlantCode	The sn_supplyon_po.plant_code property if set, otherwise the same plus company code base.	System property.
SupplierNumber	`sn_fin_supplier.number` (the ServiceNow SUP... number).	Resolved from the outbound header supplier_id. Not `erp_company_code`.

The following system properties carry payload constants and routing values: *`edi_sender`* (default SERVICENOW), *`erp_system_id`*, *`order_type`* (NB, for standard orders), *`header_note`*, *`plant_code`*, and *`org_code_override`*.

Procedure
1. If the SupplyOn organization differs from the default, set *`sn_supplyon_po.org_code_override`*.
2. Set *`sn_supplyon_po.plant_code`* for your plant.
3. Adjust the payload constants—*`edi_sender`*, *`order_type`*, *`header_note`*, and *`erp_system_id`*—as needed.

Configure inbound authentication for the async callback

Set up the API-key authentication profile, access policy, role, and service account that secure the async callback endpoint.

Before you begin
Role required: admin

About this task
The async callback endpoint requires authentication. An API-key inbound authentication profile secures it, bound to the endpoint through a REST API Access Policy. A role gates access further — the calling account must hold that role. There is no shared-secret header.

The authentication chain is as follows:

1. API key in the x-sn-apikey header: SupplyOn presents its API key in the `x-sn-apikey` header (the default ServiceNow API-key header). This credential identifies the caller.
2. API-key authentication profile: An inbound authentication profile of type HTTP Authentication Profile Using API Key (named SupplyOn, in scope `sn_supplyon_po`) reads the key from `x-sn-apikey`. It then resolves the key to the user that the key belongs to.
3. REST API Access Policy binds the profile to the endpoint: A REST API Access Policy targets the callback flow API (api_path `sn_supplyon_po/supplyon_outbound_po_async_callback`) and maps it to the SupplyOn API-key profile. The flow security scheme requires authentication and enables external access.

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4. Endpoint ACL requires the integration-user role: An endpoint ACL requires the `sn_supplyon_po.integration_user` role, so the user that the API key resolves to must also carry this role to invoke the endpoint.
5. Role is assigned to a dedicated service account: `sn_supplyon_po.integration_user` is assigned only to the dedicated SupplyOn integration service account, never to a human account.

The authentication profile, access policy, security scheme, ACL, and role ship with the application. The API key value is runtime data issued to the service account and must not be committed to source.

Procedure

1. Confirm the dedicated integration service account exists and holds the sn_supplyon_po.integration_user role.
2. In the API Keys module, create an API key attached to the service account, and record its value.
3. Confirm that SupplyOn sends the key in the `x-sn-apikey` header.
4. Provide the endpoint URL and issued key to SupplyOn for portal registration.

What to do next

Note:

- The integration_user role also includes the procurement integrator role, which is required to create the inbound purchase order confirmation records.
- The callback subflow runs as system for the staging writes, so the integration-user role is the authentication boundary between SupplyOn and ServiceNow and is kept deliberately narrow.

Register the async receiver endpoint in SupplyOn

Provide SupplyOn with the receiver endpoint URL and API key to enable asynchronous status callbacks.

Before you begin

Endpoint: POST `/api/sn_supplyon_po/supplyon_outbound_po_async_callback`

Role required: sn_supplyon_po.admin.

About this task

SupplyOn requires the endpoint location to post status callbacks. Complete this registration in the SupplyOn portal.

Procedure

1. Provide SupplyOn with the receiver endpoint URL for your instance.
2. Provide the API key issued to the integration service account.
3. Verify that SupplyOn has registered the endpoint for status notifications.

Configure and run the confirmation pull

Set the schedule and look-back window for the confirmation pull, and run it on demand.

Before you begin

Role required: admin

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About this task
The confirmation pull subflow is registered against the SupplyOn ERP source configuration.

Procedure
1. Set the **Look-back window** on the source configuration.

   The default equals the schedule interval, and SupplyOn limits the range to 100 days or less.
2. Set the **Schedule**.
3. Select **Run job** on the ERP source configuration.

What to do next
Note: The pull uses the date of the last successful run as the window start. On the first run it falls back to the last 24 hours, and if the job has not run for some time it pulls the full elapsed window (for example, 15 days if it has not run for 15 days). When a run completes, the processing message summarizes the date range used and the number of confirmations pulled. The pull maintains a high-water mark (`lastResponseDate`) so that re-runs help avoid missing or double-counting confirmations. Empty windows complete successfully with no records processed.

Verify the SupplyOn integration
Run a purchase order end to end to confirm the SupplyOn integration is configured correctly.

Before you begin
Role required: procurement_user or admin.

About this task
Each step in this procedure produces a visible system response. If a step does not produce the expected response, the integration is not configured correctly at that stage.

Note: Creating the purchase order (the shopping hub and requisition steps) is standard Source-to-Pay processing and a prerequisite for the integration, not part of it.

Procedure
Create and dispatch a purchase order

1. On the Shopping Hub page, add the item to the cart — for example, quantity 50 —, proceed to checkout, and complete the checkout.

   The order is submitted, but it is not yet a purchase order.
2. In the Source-to-Pay workspace, open the order requisition that is created.
3. On the purchase lines, set the CapEx account and the expense account, and set the ERP integration to the order cost center.
   Save the lines.
4. Open the requisition case, assign it to yourself, and start work.
   Review and populate any missing GL account information, then complete the case and close it.
5. On the order, select **Create purchase order**.

   Creating the purchase order creates the purchase order record, and a flow then processes it and writes an outbound order record. At that point the integration takes over: it maps the purchase order header and lines and posts them to SupplyOn. SupplyOn does not validate the order synchronously. It returns a transaction ID, and shortly after, it posts the processing

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outcome back to the instance. The outbound order stays **In process** until the outcome returns or the 24-hour timeout elapses.

This step also applies to the ServiceNow® purchase order.

Watch the outbound send and async callback

6. Open the outbound order (the Outbound Purchase Order [sn_spend_intg_outbound_purchase_order] table) and refresh.

   The row is **In process** and shows the transaction number.

7. Refresh again after a moment.

   The row is **Processed**, and the processing message records that SupplyOn posted back with async status OK.

Confirm the outbound order in SupplyOn

8. In the SupplyOn portal, refresh the order list.

   A new purchase order appears with the same number as the ServiceNow® purchase order.

   Note: SupplyOn does not assign its own order identifier. It reuses the ServiceNow® purchase order number, and each line is identified by a position ID derived from the ServiceNow® purchase order line number. The POL prefix is omitted because of length limits.

Enter a supplier confirmation in SupplyOn

9. Open the purchase order line and confirm the quantity, date, and price.

   Note: On the SupplyOn side, purchase orders are confirmed line by line, not in bulk. This is why confirmations are pulled per line on the ServiceNow® side.

10. To confirm partial deliveries, select split delivery and enter each delivery schedule (for example, 25 units on one date and the remaining 25 units on a later date).
11. Select **Send confirmation**.

    This does not notify ServiceNow® immediately. The confirmation pull retrieves it.

Pull and verify the confirmation in ServiceNow

12. Go to the ERP source configuration and open the SupplyOn integration service for purchase order confirmations, which triggers the confirmation pull (*`get order confirmations import`*).
13. To run the pull immediately, select **Run job**.
    If you don't run the job manually, it runs on schedule.
14. When the run completes, review the processing message.

    It summarizes the date range used and the number of confirmations pulled, along with any failures.

15. Open the purchase order and refresh.

    A new purchase order confirmation appears.

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Result

Because SupplyOn delivery schedules can split a line across dates, the import creates one purchase order confirmation per confirmed line and one confirmation line per delivery schedule. For example, a line split into two deliveries of 25 units produces one confirmation with two confirmation lines. Each line carries its quantity, its date, and a status of **Changes requested**.

Reference

Field mappings, integration status values, subflows and actions, the async callback schema, error handling, and special cases for the SupplyOn integration.

SupplyOn outbound purchase order request mapping

ServiceNow outbound purchase order header and line fields map to the SupplyOn POST /purchaseorder payload. This topic includes a sample request and response.

The send subflow maps `sn_spend_intg_outbound_purchase_order` and its lines (and the source purchase order for attachments) to the SupplyOn POST `/purchaseorder` payload.

Header field mapping

Header field mapping

ServiceNow field	Type	SupplyOn property	Notes
order_number	String	PurchaseOrderHeader.OrderNumber, GenericInboundData.DocumentNumber	Required.
order_date	Date	PurchaseOrderHeader.OrderDate	Date only, sent as ...T00:00:00Z (ISO 8601 UTC).
currency	String	PurchaseOrderHeader.Currency, NetValueCurrency	
Constant "9"	String	PurchaseOrderHeader.FunctionCode	Always 9. SupplyOn decides insert versus update. No code 4 or 5.
Sum of line net values	Decimal	PurchaseOrderHeader.NetValue	Computed at send. Omitted when there are no lines.
payment_term	String	PurchaseOrderHeader.FlexibleLongText[Code=AAB]	Omitted when blank.
header_note (property)	String	PurchaseOrderHeader.FlexibleLongText[Code=AAI]	Customer-visible. Omitted when blank.
order_type (property, NB)	String	PurchaseOrderHeader.OrderType	Standard orders.
supplier_name	String	Address[SU].Name1	Supplier address.
supplier_id (sn_fin_supplier.number)	String	Address[SU].PartnerNumber, RoutingTriple.SupplierNumber	ServiceNow supplier number (SUP...), not the sys_id and not erp_company_code.

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Header field mapping (continued)

ServiceNow field	Type	SupplyOn property	Notes
Supplier contacts	String	Address[SU].Contacts[].Email/Name/Phone	All supplier contacts.
Supplier address	String	Address[SU].Street/City/ZIP/Country	Headquarters location. Falls back to the sn_fin_supplier organization address when no headquarters location exists.
purchasing_org	String	Address[BY].Contacts[].Department	Buyer address. Contacts omitted when blank.
Routing triple	String	RoutingTriple.OrgCode	org_code_override or plus company code.
Routing triple	String	RoutingTriple.PlantCode	plant_code property or plus company code.
edi_sender (property)	String	GenericHeaderData.EDISender	Default SERVICENOW.
Constant	String	GenericHeaderData.EDIReceiver = SUPPLYON, GenericInboundData.EDIMessageCode = 220	Fixed.

Line field mapping

The integration sends one PurchaseOrderPosition per line.

Line field mapping

ServiceNow field	Type	SupplyOn property	Notes
Index times 10	Derived	Position.PosID	10, 20, 30, and so on.
sku	String	Position.Material.SupplierPartNumber	
product_name	String	Position.Material.CustomerPartDescription	
mpn	String	Position.ManufacturerArticleNumber	
unit	String	Position.CustomerPartUoM, Delivery.UoM, PriceUnitUoM	
purchased_quantity	Decimal	Position.Quantity, Delivery.Quantity	
expected_del_date	Date	Position.Delivery[].DeliveryDate (Type=1, firm)	ISO 8601 UTC.
unit_price	Decimal	Position.PricePerUnit	PriceUnit defaults to 1.

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Line field mapping (continued)

ServiceNow field	Type	SupplyOn property	Notes
unit_price_currency	String	Position.PricePerUnitCurrency, NetValueCurrency	
unit_price times quantity	Decimal	Position.NetValue	Computed.
Ship-to address fields	String	Position.Addresses[CN] (per line)	Country as ISO 3166-1 alpha-2.
Constant	Boolean	Position.ToBeConfirmed = true	Supplier must confirm.

Important: Service lines (*product_type* 20) and handling-fee lines (30) are excluded from the payload. Lines with an empty product type are kept.

Attachments

Attachments are header-level only, because SupplyOn has no per-line attachment field. They are embedded as Base64 in the top-level Attachments list on create and update (cancel carries none). Before send, the integration enforces these limits: 10 files or fewer, 5 MB per file or less, 15 MB total or less, and allowed types only. A violation throws SUPPLYON_ATTACHMENT_VIOLATION and aborts before the REST call. Attachments live on the source purchase order and are resolved by order number. Line-level attachments aren't sent.

Sample request payload


```
{
  "GenericHeaderData": {
    "EDISender": "SERVICENOW",
    "EDIReceiver": "SUPPLYON",
    "MessageDate": "2025-09-11T11:50:00Z",
    "RoutingTriple": { "OrgCode": "SENOW", "PlantCode":
 "SNPOC01", "SupplierNumber": "656546" }
  },
  "GenericInboundData": {
    "EDIMessageCode": "220",
    "DocumentNumber": "pha2026062c",
    "MessageNumber": "0000200003",
    "ERPSystemID": ""
  },
  "PurchaseOrderHeader": {
    "OrderNumber": "pha2026062c",
    "OrderDate": "2025-09-10T00:00:00Z",
    "Currency": "EUR",
    "FunctionCode": "9",
    "OrderType": "NB",
    "NetValue": 100,
    "NetValueCurrency": "EUR",
    "FlexibleLongText": [{ "Code": "AAB", "Text": "Net 30" }]
  },
  "Address": [
    { "AddressCode": "SU", "Name1": "Demo Seller GmbH",
 "PartnerNumber": "656546" },
```


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```
    { "AddressCode": "BY", "Contacts": [{ "Department":
 "Purchasing Organization" }] },
    { "AddressCode": "CN", "Name1": "Plant 2", "Street":
 "Burgweg 341", "City": "Hamburg", "ZIP": "20095", "Country":
 "DE" }
  ],
  "PurchaseOrderPosition": [
    {
      "PosID": "10",
      "Material": { "SupplierPartNumber": "SB 20260218",
 "CustomerPartDescription": "Widget" },
      "CustomerPartUoM": "PCE",
      "Quantity": 10,
      "Delivery": [{ "Type": "1", "DeliveryDate":
 "2026-08-01T00:00:00Z", "Quantity": 10, "UoM": "PCE" }],
      "PricePerUnit": 10,
      "PricePerUnitCurrency": "EUR",
      "NetValue": 100,
      "ToBeConfirmed": true
    }
  ]
}
```

Sample synchronous response (HTTP 201)

The synchronous response confirms transport receipt only. The business outcome arrives through the async status callback.

```
{
  "TransactionID": "2491C8AF4F962D2CCB87CC102AFCXXXX",
  "StatusCode": "OK",
  "StatusText": "Message received"
}
```

SupplyOn inbound confirmation field mapping

This reference describes how SupplyOn demand-response confirmations map to the inbound confirmation staging tables, including the ResponseResult code map and sample payloads.

The SupplyOn model is line-item, with no confirmation header. The integration synthesizes one confirmation header per purchase order ([sn_fcms_intg_imp_po_confirmation]) and writes one confirmation line per position schedule line ([sn_fcms_intg_imp_po_confirmation_line]). The cross-reference keys are the purchase order number (header) and the position ID (line). Both staging tables extend `sys_import_set_row`, so every column is prefixed with `u_` and stored as a string. The transform into the core tables casts them to their semantic types.

Confirmation header staging mapping

Confirmation header staging mapping (sn_fcms_intg_imp_po_confirmation)

ServiceNow field	Staging column	SupplyOn property	Notes
Purchase order	u_purchase_order	DemandResponse.OrderNumber	ServiceNow PO number. Header cross-reference key.

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Confirmation header staging mapping (sn_fcms_intg_imp_po_confirmation) (continued)

ServiceNow field	Staging column	SupplyOn property	Notes
Additional comments	u_additional_comments	Positions[].ResponseBy	Responder email. Optional.
Confirmation source	u_confirmation_source	Constant "Integration"	Fixed.
ERP source	u_erp_source	Constant "SupplyOn"	Fixed.
Status	u_status	Constant "submitted"	Submitted when sent by SupplyOn.
Active	u_active	Constant (active)	Fixed.
ERP number, ERP PO number	u_erp_number, u_erp_po_number	Not populated	External confirmation number. Not populated for SupplyOn.
Number	u_number	Auto-generated in base table	Left empty in staging.

Note: GenericHeaderData.MessageDate is the intended source for an ERP-created-date header field. That column is a planned addition and is not yet present on the staging table.

Confirmation line staging mapping

Confirmation line staging mapping (sn_fcms_intg_imp_po_confirmation_line)

ServiceNow field	Staging column	SupplyOn property	Notes
Purchase order line	u_purchase_order_line	Positions[].PosId	Line cross-reference key.
Confirmation status	u_confirmation_status	Positions[].ResponseResult	Choice. Mapped to the ServiceNow choice (see the code map).
Confirmed unit price	u_confirmed_unit_price	Positions[].PricePerUnit	Decimal.
Confirmed supplier part number	u_confirmed_supplier_part_number	Positions[].SupplierPartNumber	Populated only if SupplyOn config lets the supplier enter it.
Confirmed delivery date	u_confirmed_delivery_date	Positions[].ScheduleLines[].Date	If empty (for example, declined), reconstructed

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Confirmation line staging mapping (sn_fcms_intg_imp_po_confirmation_line) (continued)

ServiceNow field	Staging column	SupplyOn property	Notes
			from the PO line.
Quantity	u_quantity	Positions[].ScheduleLines[].Quantity	If empty (for example, declined), reconstructed from the PO line.
Additional comments	u_additional_comments	Positions[].Comment	
Sequence number	u_sequence_number	Derived	Schedule lines ordered chronologically by confirmed date.
Unit	u_unit	From the PO line	Supplier cannot change the unit of measure.
Currency	u_currency	From the PO line	Supplier cannot change the currency.
Confirmed amount	u_confirmed_amount	Not sent (price times quantity)	Amount not returned by SupplyOn.
ERP number, ERP PO line number	u_erp_number, u_erp_po_line_number	Not populated	Cross-referenced in the base table.
ERP source	u_erp_source	Constant "SupplyOn"	Fixed.
Purchase order confirmation	u_purchase_order_confirmation	Not applicable	Open item: whether this link field is needed in staging.
Number	u_number	Auto-generated in base table	Left empty in staging.

ResponseResult mapping

ResponseResult to confirmation status

SupplyOn code	ServiceNow confirmation status
4 (No action)	No action

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ResponseResult to confirmation status (continued)

SupplyOn code	ServiceNow confirmation status
5 (Confirmed as-is)	Confirmed
7 (Declined)	Rejected
6, 84, 111, 112, 113 (changed, price, date, quantity, surcharge, or rebate)	Changes requested

Note: Confirmation writes stop at staging ([sn_fcms_intg_imp_po_confirmation] and [sn_fcms_intg_imp_po_confirmation_line]). The transform into the core `sn_poem_po_confirmation` and `_line` tables is a customer or framework concern and is not part of this application.

Query and sample payloads

Summaries are queried by response-date window and demand type. The range must be 100 days or less.

```
GET /scc/demandresponse/v1/demandresponse-summaries
    ?lastResponseDateFrom=2026-06-01T00:00:00Z
    &lastResponseDateTo=2026-06-30T00:00:00Z
    &demandType=ORDER

# then, per returned order:
GET /scc/demandresponse/v1/demandresponse
    ?demandType=ORDER&orderNumber=pha2026062c
    &orgCode=SENOW&plantCode=SNPOC01&supplierNumber=656546
```

Sample response (summaries):

```
[
  {
    "lastResponseDate": "2026-06-18T12:13:17.127Z",
    "orderNumber": "pha2026062c",
    "routingTriple": { "OrgCode": "SENOW", "PlantCode":
 "SNPOC01", "SupplierNumber": "656546" }
  }
]
```

Sample response (detail):

```
{
  "OrderNumber": "pha2026062c",
  "Type": "320",
  "Positions": [
    {
      "PosId": "000020",
      "ResponseResult": "5",
      "ResponseBy": "responder@example.com",
      "ResponseDate": "2026-06-18T12:13:17.127Z",
      "SupplierPartNumber": "SB 20260218",
      "PricePerUnit": 10,
      "ScheduleLines": [{ "Date": "2026-06-30T22:00:00Z",
 "Quantity": 10, "Type": "1" }]
    }
```

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```
  ]
}
```

SupplyOn async callback request schema and branches

The request schema of the async status callback, the correlation contract, the processing branches, and sample payloads.

The async callback endpoint is `POST /api/sn_supplyon_po/supplyon_outbound_po_async_callback`. The request body follows the SupplyOn status notification schema, a pure status acknowledgment:

- *`uuid`* (required): The correlation key. Equals the synchronous 201 transaction ID.
- *`status`* (required): Strictly OK or ERROR.
- *`Errors`* (optional): A list of items, each with a Code and Text.

No line-level positions ride the callback. Supplier confirmations come only from the confirmation pull.

Correlation contract. The send subflow stamps `SON-TXN:<TransactionID>` into the outbound header message at status 20. The callback uuid is that transaction ID, so the subflow looks up the row by message and then overwrites the message with the outcome text. The subflow does not use *`erp_number`* for correlation. On the success branch only, the subflow stamps *`erp_number`* with the order number so the framework *`Handle Status Change`* business rule fires on status 30.

Callback branches and status transitions

Branch	Condition	Behavior
Invalid body	No uuid, or unparseable	Logs an error. Nothing is updated.
No matching row	Valid uuid, no header message matching the token	Logs a warning. Safe no-op. The flow returns HTTP 200 (no retry storm).
Success	status = OK	Header and lines move to 30 (Processed). Header erp_number set to the order number. Message set to a success note.
Failure	status = ERROR	Header and lines move to 40 (Failed). Message set to the error category and verbatim error text. No erp_number write.

Header and lines move in lockstep in both branches. A duplicate or re-delivered callback re-applies the same status (idempotent). An unexpected error in the subflow is caught by the native Error Handler.

Sample callback payloads

```
// Success
{ "uuid": "2491C8AF4F962D2CCB87CC102AFCXXXX", "status": "OK",
 "Errors": [] }

// Failure
{
  "uuid": "2491C8AF4F962D2CCB87CC102AFCXXXX",
```

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```
  "status": "ERROR",
  "Errors": [{ "Code": "BOOK_017", "Text": "Order rejected:
 unknown supplier for routing triple." }]
}
```

SupplyOn error handling and retry

Error handling in the SupplyOn integration uses a layered model that includes transport-level HTTP retry, status and message updates, integration error tasks, and retrigger paths.

Error handling is layered: a transport-level HTTP retry at the connection, then the S2P integration framework paradigm, rather than a custom retry loop.

- **Transport-level HTTP retry** Both aliases reference the out-of-box Default HTTP Retry Policy, which every Flow Designer REST step using the alias honors automatically. A qualifying failed call is retried up to three times at a fixed 10-second interval before the failure reaches flow logic. The retry conditions are idempotency-aware.
- **Set status and message** On failure, the flow sets the staging record integration status to 40 (Failed) and populates the message field. The status write is a direct field write, which still fires the framework business rule.
- **Error task creation** The framework async business rule Handle status change fires on status 40 and creates an integration error task (`sn_shop_erp_error_task`, subtype purchase_order) assigned to the buyer. On a successful update that carries a non-empty erp_number, the same rule closes active error tasks. Inbound (confirmation pull) errors create an unassigned, group-routed error task instead.
- **Retrigger paths** Re-clicking Create PO resubmits the order (closes error tasks, re-runs dispatch, and changes Draft to New, which re-fires the outbound trigger). Run job re-runs the confirmation pull.
- **Late callback recovery** The send subflow waits up to 24 hours for the callback. On timeout, the row is marked 40. The SON-TXN correlation token is preserved in the message, so a late callback can still reconcile the row from 40 to 30.
- **Confirmation pull retry**. Because the pull re-runs on schedule with an overlapping look-back window and a high-water mark, a transient failure recovers on the next scheduled run.

HTTP retry conditions

HTTP method	Retry conditions
GET (confirmation pull)	HTTP 408 (request timeout), 429 (too many requests), or a connect-timeout exception.
POST, PUT, DELETE (outbound POST)	Connect-timeout exception only. Not retried on 408, 429, or 5xx, to avoid double-submitting an order.

Note: A SupplyOn-returned 4xx or 5xx on the POST is not retried at the transport layer. It passes directly to the Failed handling (status 40). A transient connectivity blip is handled transparently.

SupplyOn outbound special cases and edge conditions

These special cases and edge conditions apply to the outbound send, covering non-eligible rows, release orders, missing lines, attachment violations, cancellations, and failure conditions.

The following special cases and edge conditions apply to the outbound send.

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Outbound special cases

Case	Behavior
Row not routed through the SupplyOn connection alias	The eligibility gate takes no action and logs a distinct line. The row is left for its own ERP dispatch.
Blanket release order (core blanket_order populated)	The gate takes no action and logs a distinct line. SupplyOn receives only the primary order.
Non-standard purchase order type	The factory throws an error and the row is not sent. Primary blanket (type 20) mapping is an open item.
Order with no eligible lines	The header NetValue is omitted and the POST carries no positions.
Service or handling-fee lines	These lines are excluded from the positions.
Attachment limit or type violation	The system throws `SUPPLYON_ATTACHMENT_VIOLATION` and aborts before the REST call. The row is marked Failed.
Detected cancellation	The order is reserved as the cancel operation with attachments omitted. Per-line cancel emission is pending a SupplyOn API field. Until then the order posts as a normal FunctionCode `9` order.
Synchronous response not 201	Header and lines move to `40`, the message is set to the error detail, and the flow ends without waiting.
No callback within 24 hours	Header and lines move to `40`. The correlation token is preserved so that a late callback can reconcile the row to `30`.

SupplyOn integration diagnostics

Techniques for diagnosing issues with the outbound send, the async callback, and the confirmation pull.

Trace the outbound send

The outbound logic runs through flows and subflows, and each run is logged. Open the outbound order transactions, then open the subflow context to trace the run, including the Post SupplyOn Purchase Order action. SupplyOn returns only a transaction ID, so to see the request body on the platform, enable debug logging.

Use the transaction ID

The transaction ID on the outbound order is a temporary correlation value, used for correlation. If the send fails, the SupplyOn error message appears in the processing message of the outbound order. A send fails when the 24-hour timeout elapses without SupplyOn receiving the order, or when SupplyOn rejects the order. Give the transaction ID to SupplyOn so SupplyOn can report the payload it received.

Debug the async callback endpoint

The async callback is the most frequent integration failure point. SupplyOn must post the acceptance or rejection back to the instance through a webhook; this outcome can't be pulled. To confirm whether SupplyOn is reaching the endpoint, open the SupplyOn Outbound PO -

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Async Callback flow, turn on debugging, and review the operations. With debugging on, you can see the request body that SupplyOn posted, including the transaction ID.

Enable debug logging

Set the logging verbosity system property to `debug`. The system logs then record the request payload sent to SupplyOn, so you can inspect it directly on the platform. The organization code and plant code override system properties are set in the System Properties table.

SupplyOn integration limitations

The SupplyOn integration has known limitations that affect purchase orders, supplier confirmations, and blanket orders.

Current limitations

- Purchase order cancellation is detected but not sent: The SupplyOn per-position cancel field does not exist in the POST schema. A detected cancellation posts as a normal `FunctionCode 9` order without attachments. Skipping a previously sent line does not cancel it, and there is no whole-PO cancel.
- Supplier confirmations are available only through the confirmation pull: The async callback is a status acknowledgment (whether SupplyOn accepted the order), not line data.
- Blanket main (type 20) orders are mapped to payload only: Release orders (children of a blanket) are excluded at the eligibility gate. SupplyOn receives only the main order.
- Service and handling-fee lines aren't sent: Lines with product type 20 (service) or 30 (handling fee) are excluded from the payload. Lines with an empty product type are kept.
- Attachments are sent at header level only: SupplyOn has no per-line attachment field, so line-level attachments aren't sent.

Purchase Order Management reference

The reference topics provide additional information about the lists and forms that you use in Purchase Order Management

Purchase order exception form

Use the purchase order exception form to view the information that an Operational Buyer can use to perform related tasks.

Purchase order exception form

Field	Description
Delivery plan change	
Requested delivery date	Delivery date requested by the buyer.
Purchased quantity	Quantity requested by the buyer.
Proposed delivery date	Revised delivery date proposed by the supplier.
Proposed delivery quantity	Revised delivery quantity proposed by the supplier.
Delivery date gap	Difference between delivery date in the purchase order and the proposed delivery date in the exception.
Delivery quantity gap	Difference between quantity in the purchase order and the purchase order exception.
Exception sub-type	Type of purchase order exception. Options are:

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Purchase order exception form (continued)

Field	Description
	• **Revised single delivery**: Indicates that an order is delivered as a single shipment but with quantity or delivery date changes or both. • **Phased delivery**: Indicates that the order is split and delivered in multiple shipments. • **Rejection**: Indicates that an order can't be supplied.
Line item overview	
Related PO line	Purchase order line number on which the exception is created.
Model number	Model number of the ordered item.
ERP line number	Line number in the Enterprise Resource Planning (ERP) system that corresponds to the purchase order line.
Supplier product	Item ordered by the buyer.
Delivery location	Location to which the product is to be delivered.
Total line amount	Total cost for a single item on a purchase order, which is calculated by multiplying the unit price by the quantity ordered.
Unit price	Price per unit of the item.

Related topics

Raise a delivery plan change request

Submit a delivery plan change request from a purchase order line

Purchase order exception form tabs

The Purchase order exception form includes tabs that store exception information, which an Operational Buyer can use to perform related tasks.

Purchase order exception form tabs

Tab	Description
Details	Details about the purchase order exception.
Exception intelligence	Graph of planned deliveries for the product model and total quantity for a delivery location that correspond to this exception line item. Purchase order lines are sorted by the requested delivery date starting from the current date and are grouped by whether the line items have associated exceptions. Graph showing the total spend with the supplier across the past 12 rolling months, giving buyers a quick view of recent expenditure patterns.

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Purchase order exception form tabs (continued)

Tab	Description
Exception tasks	Follow-up actions that are created from this exception. For example, supplier cases, universal requests, exception tasks, purchase order revisions, and approvals.

Related topics

- Reporting delivery plan issues
- Purchase order exception Details page

Delivery plan change form

Use the Delivery plan change form to provide deviations from a plan and create an exception.

Delivery plan changes form

Field	Description
Purchase order	Purchase order details.
ERP number	Unique number that the Enterprise Resource Planning (ERP) system generates and uses to track a specific order. This field is auto-populated.
Purchase order line	Individual line under a purchase order. When selecting a purchase order, all the purchase order lines are listed.
ERP line number	An identifier assigned to each item being ordered within a single purchase order. This field is auto-populated.
Delivery location	Location where the product is to be delivered. This field is auto-populated when the purchase order line is selected.
Supplier product	Supplier product to be delivered. This field is auto-populated when the purchase order line is selected.
Purchased quantity	Quantity purchased by the buyer. This field is auto-populated when the purchase order line is selected.
Requested delivery date	Date when the buyer is requesting the delivery. This field is auto-populated when the purchase order line is selected.
Type	Different types of delivery plan change. Options are: • **Revised single delivery**: When you select this option, the order is delivered as a single shipment but with quantity or delivery date changes or both. Enter the revised quantity or delivery date or both. • **Phased delivery**: When you select this option, the order is split in multiple shipments. Select **Add** and enter the split dates and quantity. • **Rejection**: When you select this option, the order can't be delivered. Enter a reason in the **Rejection reason** field.

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Delivery plan changes form (continued)

Field	Description
Proposed delivery quantity	Revised delivery quantity.
Proposed delivery date	Revised delivery date.

Related topics

Reporting delivery plan issues

Create new purchase order exception form

Use the Create new purchase order exception form to provide details about the exception that is being created from a universal request.

Create New Purchase Order Exception form

Field	Description
Purchase Order Exception	
Number	Unique purchase order exception ID. This field is auto-populated.
Exception type	Type of exception being created. The default value is Delivery plan change.
Opened	Date and time when this purchase order exception is created.
Priority	Urgency and business impact of a purchase order exception.
Opened by	User who created this purchase order exception.
State	Current state of this purchase order exception. The options are: • New • In progress • Closed • Canceled • Resolved
Supplier	Name of the supplier.
Assigned to	Name of the buyer that the exception is assigned to.
Related PO	Purchase order to which exception is related.
ERP line number	Identifier assigned to each item being ordered within a single purchase order. This field is auto-populated.
Delivery location	Location where the product is to be delivered. This field is auto-populated when the purchase order line is selected.
Intake source	Source of supply for the materials.

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Create New Purchase Order Exception form (continued)

Field	Description
Short description	Short description of the exception.
Description	Long description of the exception.
Delivery plan change	
Exception sub-type	Type of purchase order exceptions. Options are: • **Revised single delivery**: When you select this option, the order is delivered as a single shipment but with quantity or delivery date changes or both. Enter the revised quantity or delivery date or both. • **Phased delivery**: When you select this option, the order is split in multiple shipments. Save and then select **Manage deliveries** to enter the split dates and quantity. • **Rejection**: When you select this option, the order can't be delivered. Enter a reason in the **Rejection reason** field.
Requested delivery date	Date when the buyer is requesting the delivery. This field is auto-populated when the purchase order line is selected.
Purchased quantity	Quantity purchased by the buyer. This field is auto-populated when the purchase order line is selected.
Proposed delivery date	Revised delivery date.
Proposed delivery quantity	Revised delivery quantity.

Related topics

Create purchase order exception from Universal Request

Purchase order confirmation form

Use the purchase order confirmation form to view the confirmation details and related confirmation lines.

Purchase order confirmation form

Field	Description
Number	Auto-generated unique identifier for this PO confirmation record.
Purchase order	Purchase order associated with this confirmation.
Created	Date and time on which this PO confirmation was created.
Status	Indicates the current stage of the confirmation record. Possible values are Draft, Draft Retracted, or Submitted.
ERP number	Purchase order ID in the external ERP system.

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Purchase order confirmation form (continued)

Field	Description
Created by	Supplier contact who created this purchase order confirmation record.

Master data tables for Purchase Order Management

The primary data tables for Purchase Order Management store important information about purchase order exceptions, exception tasks, priority, split lines, purchase order confirmation, and confirmation lines.

Purchase Order Exception

Purchase order exceptions arise when a supplier cannot fulfill the agreed terms of a purchase order. Common causes include changes to delivery quantity or date, or a complete inability to fulfill the order. Operational buyers use the Purchase Order Management application to manage and resolve these exceptions.

sn_poem_exception table

The Purchase order exception [sn_poem_exception] table contains the following fields.

Purchase Order Exception table

Field	Data type	Description
Exception sub-type	String	Type of purchase order exception. Options are: **Revised single delivery**, **Phased delivery**, and **Rejection**.
Delivery date gap	Integer	Difference between delivery date in the purchase order and the proposed delivery date in the exception.
Delivery quantity gap	String	Difference between quantity in the purchase order and the purchase order exception.
Rejection reason	Integer	Reason why a supplier can't fulfill an order.
Days till deadline	Integer	Number of days remaining before the requested delivery date.
Proposed delivery date	Date	Revised delivery date proposed by the supplier.
Related PO line	Reference	Purchase order line number on which the exception is created.
Proposed delivery quantity	Decimal	Revised delivery quantity proposed by the supplier.
Exception type	String	Broad category of the purchase order exception. The exception type supported is delivery plan change.
Supplier	Reference	Supplier who fulfills this order
Requested by	Reference	User that submitted the exception.

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Purchase Order Exception table (continued)

Field	Data type	Description
Primary contact	Reference	Main point of contact for resolving this exception on the buyer side.

Related topics

- View a purchase order exception
- Purchase order exception Details page

Purchase Order Exception Task table

Purchase order exception tasks are individual tasks assigned to users as part of resolving a purchase order exception.

sn_poem_exception_task table

The Purchase Order Exception Task (sn_poem_exception_task) table contains the following fields.

Purchase Order Exception Task table

Field	Data type	Description
Supplier	Reference	Supplier associated with the purchase order exception.
Supplier location	Reference	Specific location or site of the supplier relevant to this task.
Purchase order line	Reference	Line item on the purchase order associated with this task.
Sub type	String	Category of the exception task.
Related case	Reference	Exception case associated with this task.
Purchase order	Reference	Purchase order related to this exception task.
Primary contact	Reference	Main point of contact for resolving this exception on the buyer side.

Related topics

- View a purchase order exception task
- Create and assign a purchase order exception task
- Work on a purchase order exception task

Purchase Order Exception Split Line Table

A purchase order exception split line is a subdivided line item created when a line item requires delivery in phases. A split line is created when a supplier selects the **Delivery plan change** exception type and the **Phased delivery** subtype.

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sn_poem_exception_split_line table

The Purchase Order Exception Split Line [sn_poem_exception_split_line] table contains the following fields.

Purchase Order Exception Split Line table

Field	Data type	Description
Proposed delivery date	Date	Revised delivery date proposed for this split line as part of the exception resolution.
Updated	Date/Time	Revised delivery quantity proposed for this split line.
Notes	String	Additional comments related to this split line.
Created	Date/Time	Date and time when this split line record was created.
Updates	Integer	Number of fields edited every time the record is updated.
Parent exception	Reference	Reference to the purchase order exception record that this split line belongs to.
Updated by	String	User who last modified this split line record.
Proposed delivery quantity	Decimal	Revised delivery quantity proposed by the supplier.
Created by	String	User who created this split line record.

Related topics

Purchase order exception form

Delivery plan change form

Purchase Order Confirmation table

Purchase order confirmations are supplier-generated transactions that acknowledge a buyer's order and communicate the supplier's ability to fulfill it as specified.

sn_poem_po_confirmation table

The Purchase Order Confirmation [sn_poem_po_confirmation] table contains the following fields.

Purchase Order Confirmation table

Field	Data type	Description
Created by	String	Supplier contact who created this purchase order confirmation record.
Purchase order	Reference	Reference to the purchase order associated with this confirmation.

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Purchase Order Confirmation table (continued)

Field	Data type	Description
Confirmation source	Choice	Indicates how the confirmation was received, such as an email, manually entered, imported from an ERP, created by an AI agent, or submitted from the Supplier Collaboration Portal.
Number	String	Auto-generated unique identifier for this PO confirmation record.
Active	True/False	Indicates whether this confirmation record is currently active.
Created	Date/Time	Date and time on which this PO Confirmation was created.
ERP number	String	Reference purchase order ID in the external ERP system.
Updates	Integer	Number of fields edited every time the record is updated.
Additional comments	Journal Input	Free text for the supplier to enter any comments relevant to the entire order confirmation.
Updated by	String	User who last modified this record.
ERP Source	Reference	Reference to the ERP system from which this confirmation originated.
Updated	Date/Time	Date and time when this record was last modified.
Status	Choice	Indicates the current stage of the confirmation record. Possible values are Draft, Draft Retracted, or Submitted.
ERP created	Date/Time	Data and time when this purchase order confirmation was created in the ERP system.

Related topics

View a purchase order exception

Purchase Order Confirmation Line table

A purchase order (PO) confirmation line is a supplier's line-level response acknowledging whether a purchase order line can be delivered under the requested terms.

sn_poem_po_confirmation_line table

The Purchase Order Confirmation Line [sn_poem_po_confirmation_line] table contains the following fields.

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Purchase Order Confirmation Line table

Field	Data type	Description
ERP number	String	PO confirmation ID in external enterprise resource planning (ERP) systems.
Purchase order line	Reference	PO line ID that this confirmation line acknowledges.
Additional comments	Journal Input	Free text for the supplier to enter any comments relevant to the entire order confirmation line.
Created	Date/ Time	Date and time on which this PO confirmation was created.
Purchase order confirmation	Reference	ServiceNow ID of this PO confirmation line.
Quantity	Decimal	Quantity for which supplier is confirming, which may be a subtotal of the order line quantity.
Confirmed supplier part number	String	Supplier part the supplier commits to deliver.
Confirmed amount	FX Currency	Confirmed total monetary amount for the confirmation line quantity.
Updated	Date/ Time	Date and time when this record was last modified.
Confirmed unit price	FX Currency	Unit price for which the supplier commits to deliver.
Updated by	String	User who last modified this record.
Confirmed delivery date	Date	Delivery date for which the supplier commits to deliver.
Created by	String	Supplier contact who created this purchase order confirmation.
Confirmation status	Choice	Confirmation status provided by the supplier for this order line and quantity.
Sequence number	String	An identifier used to define sequence order when multiple confirmation segments for the same purchase order line are present.
Updates	Integer	Number of fields edited every time the record is updated.
Unit	Reference	Unit of measure of this confirmation line.

Related topics

View a purchase order exception

Sourcing and Procurement Operations

ServiceNow Sourcing and Procurement Operations (SPO) is an AI-assisted procurement tool. Employees can use it to shop for the goods and services they need at work.

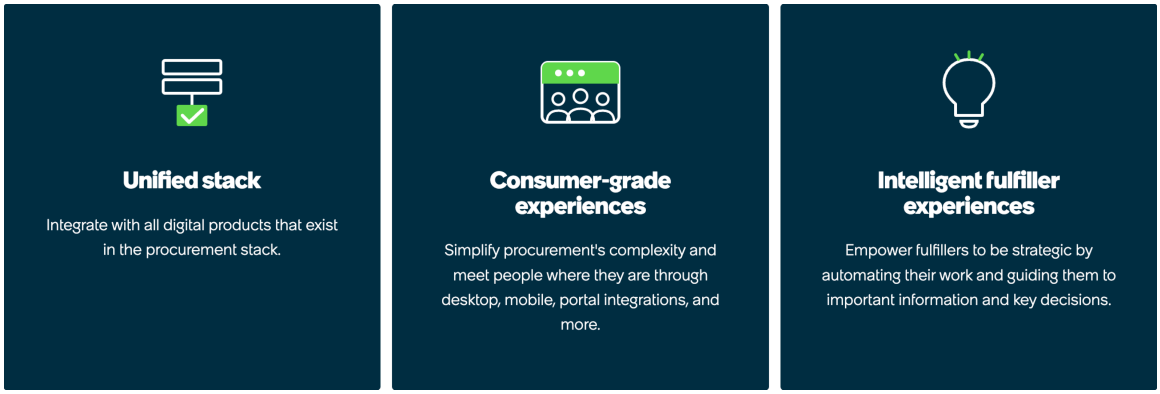
This video provides a visual overview of Sourcing and Procurement Operations and its key capabilities.

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https://player.vimeo.com/video/1170254217?h=5a6b8a745a&badge=0&autopause=0&player_id=0&app_id=58479

SPO value proposition

Provide a seamless procurement experience with:



ServiceNow Otto for SPO Learn more about ServiceNow Otto for SPO.	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

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Learn more about what's new and changed. See the https://www.servicenow.com/docs/access?context=sourcing-procurement-operations-rn-static&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SPO Implementation Essentials and more, from ServiceNow University.

Best Practices

Explore the Best Practices content library to access resources and proven guidance that help accelerate the implementation and deployment of Sourcing and Procurement Operations features at Best Practices.

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.

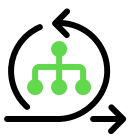
ServiceNow Community

Connect with other Sourcing and Procurement Operations users at ServiceNow Community.

ServiceNow Otto for Sourcing and Procurement Operations (SPO)

ServiceNow Otto for Sourcing and Procurement Operations (SPO) provides conversational AI assistance for procurement tasks. You can summarize records, draft emails, categorize purchases, analyze supplier messages, submit requests through conversation, and upload documents for processing.

Get started

Explore	Configure	Use
		
Learn more about ServiceNow Otto for SPO	Configure the ServiceNow Otto for SPO application to get started	Use generative AI capabilities offered by ServiceNow Otto for SPO

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Use Sourcing and Procurement Operations AI agent collection  Use agentic workflows in ServiceNow Otto for SPO		

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI 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 AI 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 AI 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. Furthermore, 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. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

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For more information, see the Now Assist documentation.

Explore ServiceNow Otto for Sourcing and Procurement Operations (SPO)

ServiceNow Otto for Sourcing and Procurement Operations (SPO) is an application that adds generative AI capabilities to the Source-to-Pay Workspace to help requesters and procurement teams work more efficiently.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

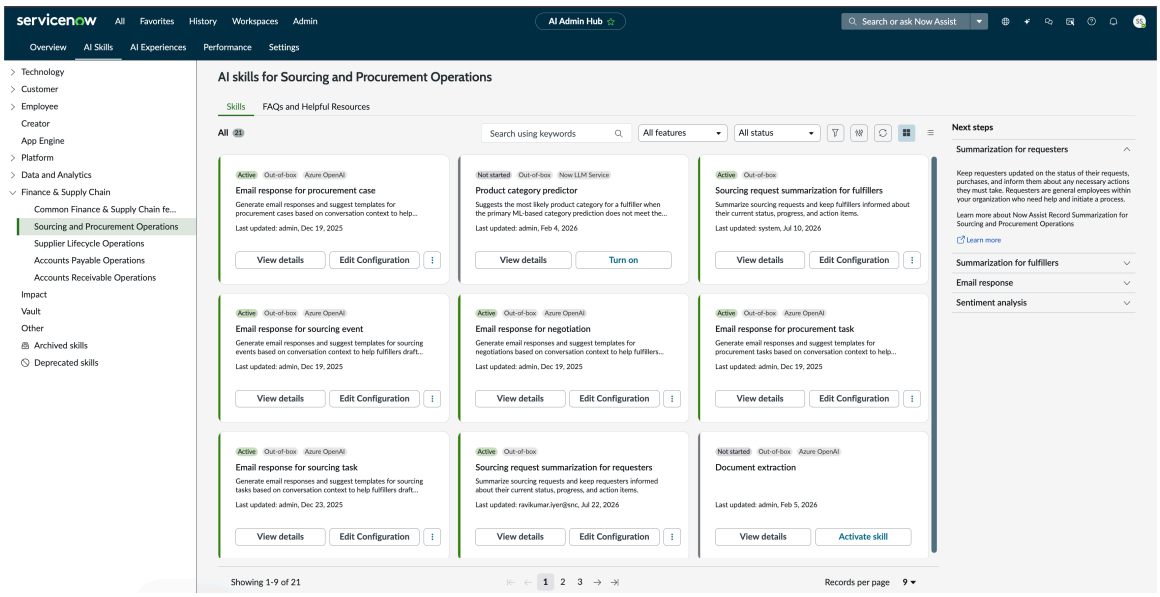
Overview of ServiceNow Otto for Sourcing and Procurement Operations (SPO)

ServiceNow Otto for Sourcing and Procurement Operations (SPO) uses generative AI to handle procurement requests and understand records. This helps procurement teams improve visibility, reduce manual effort, and make faster, smarter decisions throughout the procurement process.

ServiceNow Otto for Sourcing and Procurement Operations (SPO) includes the following capabilities:

- Provides AI-assisted conversational intake, enabling requesters to submit procurement requests in natural language. ServiceNow Otto for SPO uses procurement-related topics to route requests to the appropriate intake process and helps requesters submit accurate requests without relying on fulfillers.
- Produces generative AI-powered record summaries that help requesters and fulfillers quickly interpret completed actions, status, and next steps.
- Embeds summary access across procurement experiences, including Source-to-Pay Workspace, Shopping Hub, and the ServiceNow Otto panel.
- Monitors requester sentiment across active procurement cases, enabling procurement specialists to identify, prioritize, and manage sensitive requests proactively
- Assists procurement specialists and buyers in composing clear, professional, and accurate email responses using ServiceNow Otto.

AI skills for Sourcing and Procurement Operations



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The following skills are available in ServiceNow Otto for Sourcing and Procurement Operations (SPO).

- Skills available for requesters:
  - Document extraction
  - Purchase requisition summarization for requesters
  - Purchase order summarization for requesters
  - Sourcing request summarization for requesters

  Note: A requester with the sn_spend_gen_ai.now_assist_requester role can use these summarization skills in Shopping Hub.

- Skills available for fulfillers:
  - Email response for acknowledgement task
  - Email response for negotiation
  - Email response for procurement case
  - Email response for procurement task
  - Email response for purchase requisition
  - Email response for sourcing event
  - Email response for sourcing request
  - Email response for sourcing task
  - Negotiation summarization for fulfillers
  - Procurement case summarization for fulfillers
  - Product category predictor
  - Purchase requisition summarization for fulfillers
  - Sentiment analysis for procurement case
  - Sourcing request summarization for fulfillers
  - Sourcing event summarization for fulfillers
  - Spend category predictor

  Note: A fulfiller with the sn_spend_gen_ai.now_assist_fulfiller role can use these summarization skills in Source-to-Pay Workspace.

For more information about setting up ServiceNow Otto for SPO, see Configure ServiceNow Otto for Sourcing and Procurement Operations (SPO).

As a requester, you can use ServiceNow Otto for SPO to:

- Submit purchase requisitions
- Sourcing requests
- Request for products or services that aren't available in the catalog

For guidance on using these capabilities in ServiceNow Otto for SPO, see Use ServiceNow Otto for Sourcing and Procurement Operations (SPO).

ServiceNow Otto for SPO is also available in Virtual Agent, where it uses large language models (LLMs) and generative AI skills to enhance conversational experiences. These capabilities

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help improve deflection rates and reduce the manual effort required for Natural Language Understanding (NLU) topic discovery.

For detailed information about ServiceNow Otto for Virtual Agent, including how to use generative AI skills in your conversations and interact with the Virtual Agent when ServiceNow Otto capabilities are enabled in your instance, see Using ServiceNow® Otto for Virtual Agent.

During the Conversational Interfaces Assistants guided setup, a ServiceNow Otto assistant for Virtual Agent is created automatically. For more information about this assistant, see Create LLM assistants.

Domain separation is supported for ServiceNow Otto for Virtual Agent. For more information, see Domain separation and Virtual Agent.

Supporting information for ServiceNow Otto for Sourcing and Procurement Operations (SPO)

Get a quick overview of the important information that is related to the ServiceNow Otto for Sourcing and Procurement Operations (SPO) application.

Supported versions

ServiceNow Otto for SPO is supported starting with Xanadu.

Supported user interfaces

The ServiceNow Otto for SPO application includes the skills that are listed in the following table.

ServiceNow Otto for SPO supported interfaces

Interface	Skill
Virtual Agent	• Conversational catalog shopping experience in ServiceNow Otto for Virtual Agent. • Track request status • Document extraction
Source-to-Pay Workspace	• Email response for acknowledgement task • Email response for negotiation • Email response for procurement case • Email response for procurement task • Email response for purchase requisition • Email response for sourcing event • Email response for sourcing request • Email response for sourcing task • Negotiation summarization for fulfillers • Procurement case summarization for fulfillers • Product category prediction

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ServiceNow Otto for SPO supported interfaces (continued)

Interface	Skill
	• Purchase requisition summarization for fulfillers • Sentiment analysis for procurement case • Sourcing request summarization for fulfillers • Sourcing event summarization for fulfillers • Spend categories prediction
Shopping Hub	• Purchase order summarization for requesters • Purchase requisition summarization for requesters • Sourcing request summarization for requesters
Core UI	• Negotiation summarization for fulfillers • Procurement case summarization for fulfillers • Product category predictor • Purchase requisition summarization for fulfillers • Sentiment analysis for procurement case • Sourcing event summarization for fulfillers • Sourcing request summarization for fulfillers • Spend category predictor

Application information

Activate the ServiceNow Otto 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:

- ServiceNow Otto for Platform (com.sn.now.platform)
- Sourcing and Purchasing Automation(sn_pr)
- ServiceNow Otto for FSC Common (sn_fsc_genai)

Activate the applications in the following order:

1. ServiceNow Otto for Platform (sn_genai_platform)
2. Sourcing and Purchasing Automation (sn_pr)
3. ServiceNow Otto for FSC Common (sn_fsc_genai)
4. ServiceNow Otto for Sourcing and Procurement Operations (SPO) (sn_spend_gen_ai)

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For more information, see Configure ServiceNow Otto for Sourcing and Procurement Operations (SPO).

Automatically assign categories during SR and PR creation

AI-driven category prediction automatically assigns product and spend categories when sourcing requests, purchase requisitions, or purchase orders are created or updated, ensuring consistent classification at the line level.

Key benefits

When working with sourcing requests (SRs), purchase requisitions (PRs), purchase orders (POs), or invoices, you must classify line-level items into product and spend categories. The Spend categorization agent enables this process by generating and validating AI-driven predictions for line-level items. The **Product category** and **Spend category** fields are updated only when they are empty. This process ensures accurate reporting, consistent procurement processes, and efficient downstream automation while reducing manual effort.

View the Spend categorization agent by navigating to **All** > **AI Agent Studio** > **Create and manage** > **Spend categorization agent**.

For more information about enabling and configuring this agent, see Activate the Spend categorization agent.

Classification solutions used for predictions

For predicting product category on PRs and SRs, the following classification solutions have been added:

- Product Category Classification For PRL
- Product Category Classification For POL

Classification solutions identify the most appropriate Product Category using product related information.

You can access the classification definitions by navigating to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.

Similarity solutions used for predictions

For predicting spend category on PRs and SRs, the following similarity solutions have been added:

- Spend Category by PRL
- Spend Category by POL

Similarity solutions compare line item details with previously categorized data to suggest the best Spend Category.

You can access the similarity definitions by navigating to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.

To use the solution definitions for both PRL and POL in your instance, open each definition and select **Update and Retrain**. This action ensures that the solution definitions are trained to meet your specific requirements. Any PR or SR with empty Product category and Spend category fields is updated using the latest model outputs.

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Note: Users with the category_manager_admin and now_assist_admin roles can update the solution definitions.

Both solution types retrain automatically based on configured training frequency. By default, the solution definitions run automatically once every seven days.

Semantic search used for predictions

When ML classification or similarity solutions return no results, the Spend categorization agent uses retrieval-augmented generation (RAG) semantic search as a second-tier mechanism to predict product and spend categories. RAG semantic search matches line item details against the following indexes:

- purchaseLineForProductClassification
- supplierProducts
- purchaseLineForSpendClassification
- purchaseOrderLineForProductClassification
- purchaseOrderLineForSpendClassification

LLM predictor skills used for predictions

When both ML classification or similarity solutions and RAG semantic search return no results, the Spend categorization agent invokes LLM-based predictor skills as the third and final tier. These skills use large language model reasoning to suggest categories for a fulfiller (`sn_shop.procurement_specialist`).

- **Product category predictor**: Suggests the most likely product category when both ML classification and RAG semantic search return no results.
- **Spend category predictor**: Suggests the appropriate spend category when both ML similarity and RAG semantic search return no results.

These skills predict and update the **Product category** and **Spend category** fields on the PRLs for an SR or PR.

View these skills by navigating to **All** > **AI Admin Hub** > **Finance & Supply Chain** > **Sourcing and Procurement Operations**.

How to configure

The following system properties control category prediction behavior:

Property	Description	Default value
`sn_spend_gen_ai.spend_categorization.confidence_score_threshold`	Defines the confidence score threshold for predicting the Product category and Spend category fields. Set a value between 0 and 100.	80
`sn_spend_gen_ai.enable_category_based_fallback`	Enables LLM-based fallback (Product category predictor and Spend category predictor skills) for product and spend category prediction when both ML and RAG semantic search return no results. Configurable by users with the	true

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Property	Description	Default value
	`sn_shop.procurement_administrator` role.	

Product and spend category prediction logic

The Spend categorization agent uses a three-tier fallback chain to predict product and spend categories for SR and PR records.

Tier	Mechanism	Condition to advance to next tier
1	ML Classification and Similarity	Returns no result
2	RAG Semantic Search	Returns no result and `sn_spend_gen_ai.enable_category_fallback_lo` is set to `true`
3	Product category predictor and Spend category predictor skills	None

Note: When a product category is already populated on a purchase request line (PRL), spend category candidates are filtered based on the spend-category-to-product-category mappings in the Spend Categories table. For more information, see Map spend categories to product categories manually.

If one spend category is mapped, it is auto-selected without further ML or RAG input. If multiple spend categories are mapped, ML and RAG results are filtered to that mapped set only. If no mapping exists, the full result set is used.

How it works

When a new sourcing request (SR) or purchase request (PR) is created using the **I need a product**, **I need a service**, or **I need to submit a quote** record producers, the Spend categorization agent is automatically triggered. The Spend categorization agent predicts and updates the product category and spend category on the purchase request lines (PRLs).

If the AI-predicted category differs from the category selected by the requester, the **Product category** and **Spend category** fields are updated only when the prediction confidence score exceeds 80%.

Visual indicators appear next to the **Product category** and **Spend category** fields in the Playbook view and the Purchase Line related lists, indicating that the fields were updated using AI predictions. In such cases, a corresponding comment is added to the activity stream, for example, "AI-suggested Spend category updated from X to Y."

You can manually select different values for either category field from the Product category and Spend category drop-down lists on the Purchase Line form.

Any user-selected overrides are captured and used to improve future model accuracy. When a different value is selected, a banner appears at the top of the form that informs you that an AI-predicted value was applied.

The prediction model also analyzes information in documents attached to the SR or PR, such as the product name and product description, to predict the product and spend categories.

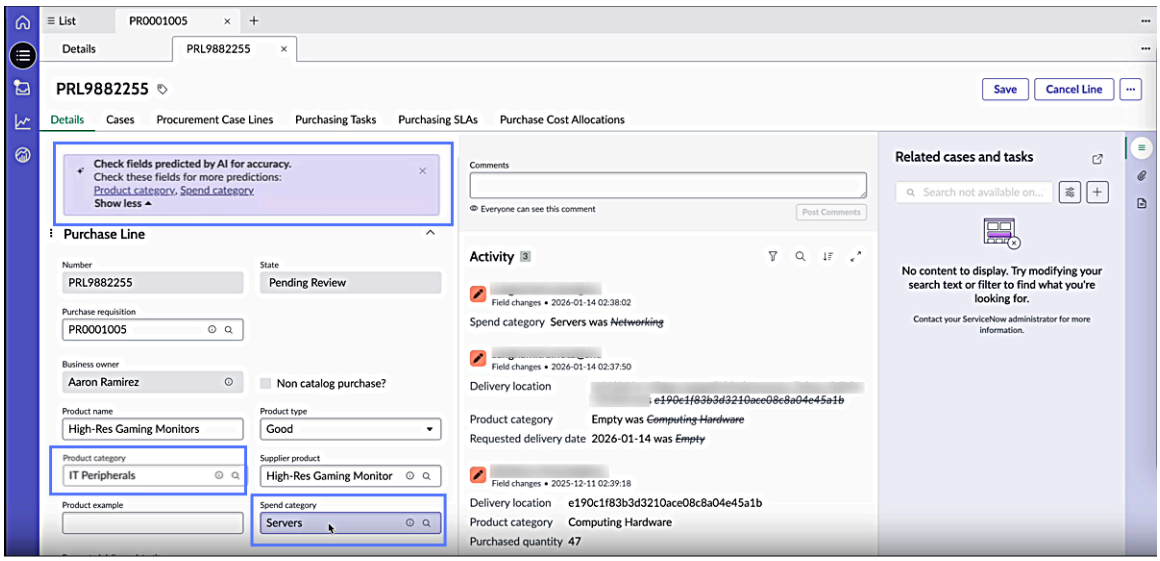
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Audit purchase lines automatically when predictive fields change

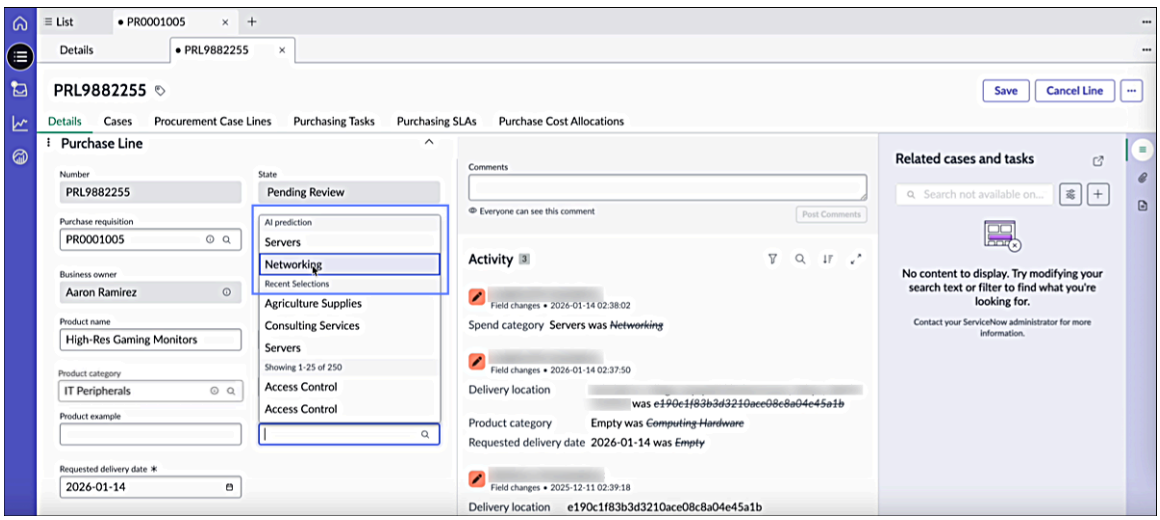
Automated audit compares existing categories with the latest AI prediction when key predictive fields are updated in a sourcing request or purchase requisition, flagging inconsistencies without automatically updating category fields.

When key predictive fields in a sourcing request (SR) or purchase requisition (PR) are updated, the Spend categorization agent runs an automated audit to compare the existing categories with the latest AI prediction. Key predictive fields include Product name, Supplier, Supplier product, Purchase reason, and Short description.

When key predictive fields are updated in a sourcing request (SR) or purchase requisition (PR), the Spend category and Product category fields are automatically populated with AI-predicted values. A warning message appears on the PRL form informing users to review the AI-predicted values for accuracy before saving them.



If the AI-predicted value does not meet your requirements, you can select a different value from the **Spend category** drop-down list. The same AI-predicted and override behavior applies to the **Product category** field as well.



This audit relies on existing categorization rules and taxonomy mappings, along with historical classification data used for training and pattern analysis.

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If a category mismatch is detected, the system flags the inconsistency and displays an alert at the line level, without automatically updating the category fields.

The audit runs asynchronously to ensure minimal impact on system performance.

For more information about the prediction logic and flow, refer to the section 'Product and spend category prediction logic' in Automatically assign categories during SR and PR creation.

Predict categories for PRLs and POLs imported through integrations

Automatically predict and assign product and spend categories for imported purchase requisition lines and purchase order lines using scheduled on-demand scripts.

The Spend categorization agent automatically predicts and assigns product and spend categories for imported purchase requisition lines (PRLs) and purchase order lines (POLs) using scheduled on-demand scripts.

The following scheduled on-demand scripts have been added:

- **Product and spend category prediction for purchase line**: Updates the spend and product category fields on PRLs imported through integration from third-party systems.
- **Product and spend category prediction for purchase order line**: Updates the spend and product category fields on POLs imported through integration from third-party systems.

After the PRLs and POLs are imported into your instance, open the appropriate scheduled on-demand script and select **Execute Now** to run the script and update the spend and product category fields.

How product and spend category updates work for imported PRLs and POLs

- Predictions are applied automatically when category fields are empty.
- Only users with admin role can run on demand jobs for bulk updates.
- You receive an email confirmation once a job completes.
- Jobs resume from where the previous run ended.
- POLs linked to PRLs inherit the spend category from the associated PRLs, while standalone POLs receive AI-predicted categories.

Ensure consistent invoice spend categories during PO matching

Maintain aligned spend categories when matching invoice lines with purchase order lines by applying the spend category from the PO line to the corresponding invoice line.

The Spend categorization agent maintains consistent spend categories when matching invoice lines (IVLs) to purchase order lines (POLs).

During matching, the spend category from the PO line is applied to the corresponding invoice line. If the PO line does not have a spend category, the invoice line remains uncategorized.

For older invoice lines created before SPO installation, the system generates updated predictions to populate missing spend categories.

Configure ServiceNow Otto for Sourcing and Procurement Operations (SPO)

Configure the ServiceNow Otto 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, Shopping Hub, and Core UI.

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Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Role required: sn_nowassist_admin.nsa_admin

About this task

The following AI skills for fulfillers are activated by default:

- Email response for acknowledgement task
- Email response for negotiation
- Email response for procurement case
- Email response for procurement task
- Email response for purchase requisition
- Email response for sourcing event
- Email response for sourcing request
- Email response for sourcing task
- Sentiment analysis for procurement case
- Sourcing request summarization for fulfillers
- Sourcing event summarization for fulfillers
- Negotiation summarization for fulfillers
- Purchase requisition summarization for fulfillers
- Procurement case summarization for fulfillers

If the AI skills are turned off, you can reactivate them or configure them using the AI Admin Hub. The console contains everything that you need to install the plugins and configure the generative AI skills. For more information, see Overview tab in AI Admin Hub.

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

The following table lists the features and skills that you can access from the AI Admin Hub.

AI skills for Sourcing and Procurement Operations in the AI Admin Hub

AI skills	Description
Document extraction	Enables requesters to define and customize the fields that ServiceNow Otto extracts from uploaded Statements of Work (SOWs), quotes, and other supporting attachments.
Email response for acknowledgement task	Generate email responses and suggest templates for acknowledgement tasks based on conversation context to help fulfillers draft emails quickly and maintain clear communication.

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AI skills for Sourcing and Procurement Operations in the AI Admin Hub (continued)

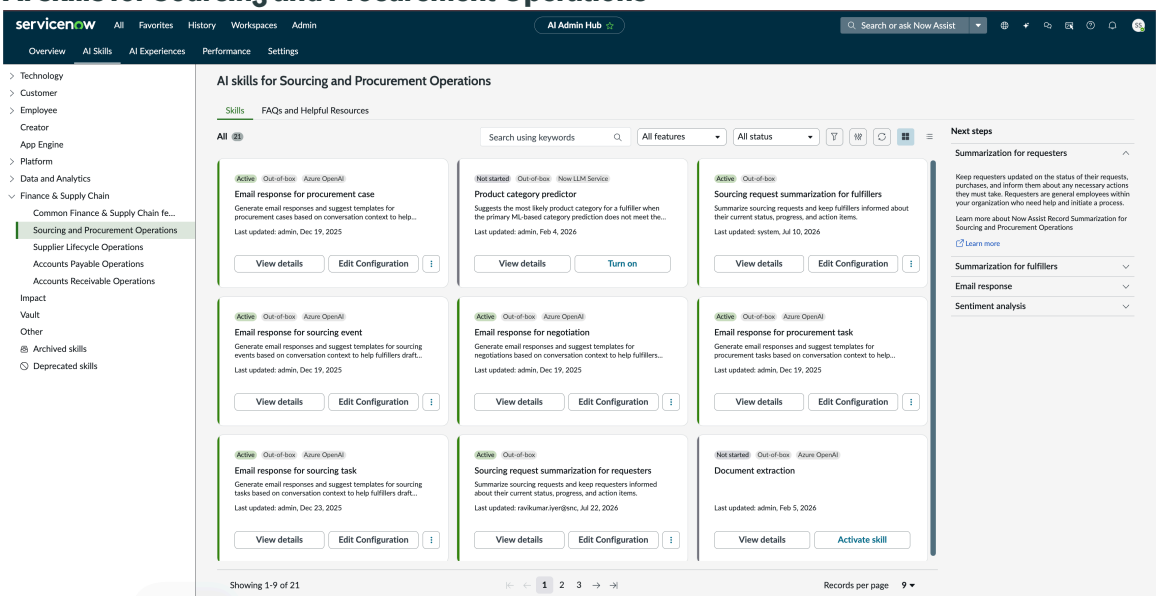
AI skills	Description
Email response for negotiation	Generate email responses and suggest templates for negotiations based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for procurement case	Generate email responses and suggest templates for procurement cases based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for procurement task	Generate email responses and suggest templates for procurement tasks based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for purchase requisition	Generate email responses and suggest templates for purchase requisitions based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for sourcing event	Generate email responses and suggest templates for sourcing events based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for sourcing request	Generate email responses and suggest templates for sourcing requests based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Email response for sourcing task	Generate email responses and suggest templates for sourcing tasks based on conversation context to help fulfillers draft emails quickly and maintain clear communication.
Negotiation summarization for fulfillers	Summarize negotiations to keep fulfillers informed on their status, progress, and action items.
Procurement case summarization for fulfillers	Summarize procurement cases and keep fulfillers informed about their status, progress, and action items.
Purchase requisition summarization for fulfillers	Summarize purchase requisitions and keep fulfillers informed about their status, progress, and action items.
Purchase requisition summarization for requesters	Summarize purchase requisitions to keep requesters informed about their status, progress, and action items.

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AI skills for Sourcing and Procurement Operations in the AI Admin Hub (continued)

AI skills	Description
Product category predictor	Suggests the most likely product category for a fulfiller when the primary ML-based category prediction doesn't meet the confidence threshold.
Purchase order summarization for requesters	Summarize purchase orders to keep requesters informed about their status, progress, and action items.
Sentiment analysis for procurement case	Analyze requester sentiment across procurement case to help fulfillers prioritize urgent issues and make informed decisions. This skill provides sentiment evaluations, trend analysis, and AI-generated summaries that explain the reasoning behind each sentiment.
Sourcing event summarization for fulfillers	Summarize sourcing events to keep fulfillers informed on their status, progress, and action items.
Sourcing request summarization for fulfillers	Summarize sourcing requests and keep fulfillers informed about their status, progress, and action items.
Sourcing request summarization for requesters	Summarize sourcing requests to keep requesters informed about their status, progress, and action items.
Spend category predictor	Suggests the appropriate spend category for a fulfiller when primary ML-based category prediction doesn't meet the confidence threshold.

AI skills for Sourcing and Procurement Operations



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Procedure

1. Install the ServiceNow Otto 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 ServiceNow Otto for Sourcing and Procurement Operations (SPO).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub.
3. Expand the **Finance and Supply Chain** workflow group and select **Sourcing and Procurement Operations**.

   The Sourcing and Procurement Operations features are grouped under the Finance and Supply Chain workflow group. Each feature has its associated skills.
4. Activate and configure the AI skills for Sourcing and Procurement Operations.

AI skills

Skills	Action
○ Sourcing request summarization for requesters ○ Purchase requisition summarization for requesters ○ Purchase order summarization for requesters ○ Document extraction	On the skill card that you want to activate, select **Activate skill**.
○ Email response for acknowledgement task ○ Email response for negotiation ○ Email response for procurement case ○ Email response for procurement task ○ Email response for purchase requisition ○ Email response for sourcing event ○ Email response for sourcing request ○ Email response for sourcing task ○ Sentiment analysis for procurement case ○ Sourcing request summarization for fulfillers ○ Purchase requisition summarization for fulfillers ○ Procurement case summarization for fulfillers	On the skill card that you want to activate, select **Activate skill**.

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Skills	Action
○ Negotiation summarization for fulfillers ○ Sourcing event summarization for fulfillers	

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** for the skill 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.

Option	Description
Skill is always available	Skill is continuously available to users.
Customize skill availability	The skill is available only when the certain conditions are met (Default). (Optional) Use the condition builder to set your conditions.

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.

Option	Description
In-product desktop	AI skills are displayed on forms and work spaces.
ServiceNow Otto panel	AI skills are available in the ServiceNow Ot to panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more infor mation, see Configure multilingual service for **Note:** If you don't see this option, you must activate the ServiceNow Otto pan el. For more information, see Activate the ServiceNow Otto panel standard

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 Sourcing and Procurement Operations.**.
The skill is activated.

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Customize an AI skill in Sourcing and Procurement Operations

Customize an AI skill in SPO so that fulfillers and requesters can use the AI skills in the Source-to-Pay Workspace, Shopping Hub, and in the Core UI.

Before you begin

Role required: sn_nowassist_admin.nsa_admin

About this task

From the AI Admin Hub console, you can select the input table, related records, and fields for each input template of the Summarization for fulfillers skill. Then configure the prompt headers to include in the general summary.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. In the **Finance and Supply Chain** workflow group, select **Sourcing and Procurement Operations** to view the AI skills for the ServiceNow Otto for SPO features.
3. Create a copy of a skill and customize the input fields.

   a. On the skills card that you want to copy, select the More actions icon (⋮)..

   b. In the Active skills section, locate the skill that you'd like to copy and select the More actions icon (⋮), and then select **Make copy**.
   The copied skill opens and 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 ServiceNow Otto 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.

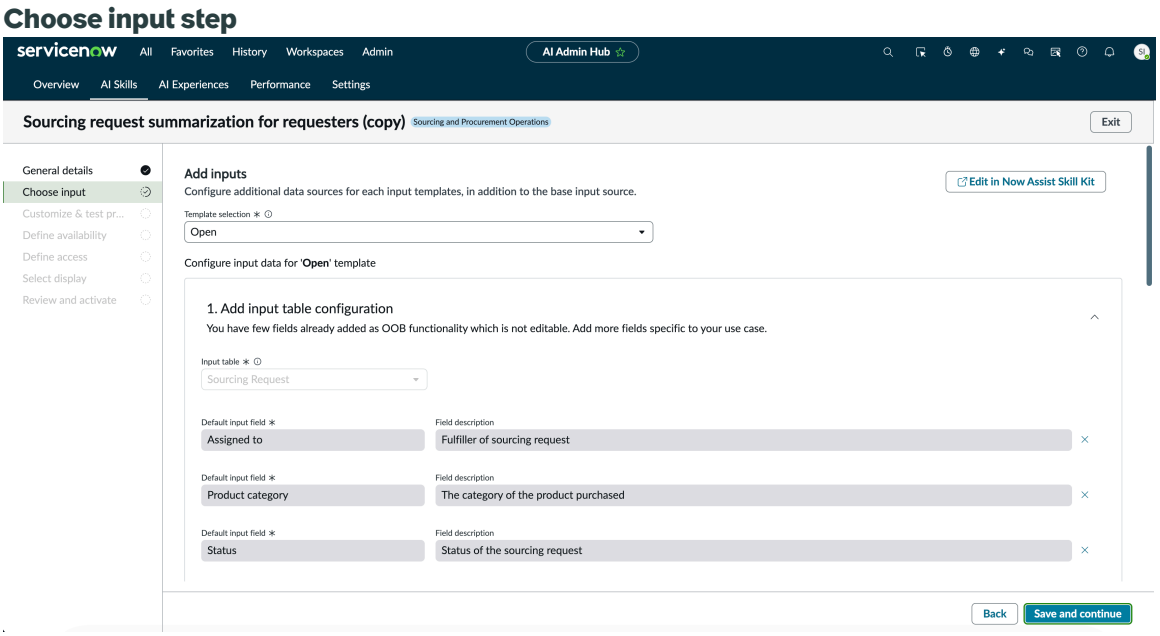
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   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, `Product category`.
Field description	Description of the base input field value. For example, `The category of the product purchased.`

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.

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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.

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.

For example, for the Sourcing request summarization for requesters skill, you can select the following available prompt sections:

- **Requester overview for SR**
- **Requester next steps for SR**
- **Requester SR closed**

The following table lists the mandatory prompt headers for the Sourcing request summarization for requesters skill.

Mandatory prompt headers

Input template state	Mandatory prompt header
Open	▪ Requester overview for SR ▪ Requester next steps for SR
Closed	Requester SR closed

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.

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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 **ServiceNow Otto panel**.

- **In-product**: When selected, the AI 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.

- **ServiceNow Otto panel**: When selected, the AI skills are available in the ServiceNow Otto panel.

  AI skills are available in the ServiceNow Otto panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more information, see Configure multilingual service for ServiceNow Otto applications.

  Note: If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat.

  For the skills that appear in the ServiceNow Otto 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
- Negotiation
- Sourcing event
- Purchase order

Skill inputs for ServiceNow Otto 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 AI skills

Inputs identify the data used for an AI skill. Inputs include the table and fields used to generate a record summary.

You can modify inputs, but you can't modify an AI skill's data source. The data source contains the tables and fields that the skill relies on.

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AI skills for ServiceNow Otto for SPO

The ServiceNow Otto for SPO includes the following AI skills:

- Email response for acknowledgement task
- Email response for negotiation
- Email response for procurement case
- Email response for procurement task
- Email response for purchase requisition
- Email response for sourcing event
- Email response for sourcing request
- Email response for sourcing task
- Negotiation summarization for fulfillers
- Procurement case summarization for fulfillers
- Purchase order summarization for requesters
- Purchase requisition summarization for fulfillers
- Purchase requisition summarization for requesters
- Sentiment analysis for procurement case
- Sourcing event summarization for fulfillers
- Sourcing request summarization for fulfillers
- Sourcing request summarization for requesters

Email response for acknowledgement task skill

Generates clear, context-aware email responses and ready-to-use acknowledgement templates that help fulfillers draft emails quickly while maintaining concise and effective communication.

The following table lists the inputs for Email response for acknowledgement task from Choose input for email response page in the AI Admin Hub console.

Email response for acknowledgement task skill input

Input	Description
Base input table	sn_shop_acknowledgement_task
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

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Email response for negotiation skill

Generates context-aware email responses and provides ready-to-use negotiation templates to help fulfillers draft emails quickly while maintaining clear, professional communication.

The following table lists the inputs for Email response for negotiation skill from Choose input for email response page in the AI Admin Hub console.

Email response for negotiation skill skill input

Input	Description
Base input table	sn_shop_negotiation
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for procurement case skill

Generates context-aware email responses and provides ready-to-use templates for procurement scenarios, enabling fulfillers to draft emails quickly while ensuring clear and professional communication.

The following table lists the inputs for Email response for procurement case from Choose input for email response page in the AI Admin Hub console.

Email response for procurement case skill input

Input	Description
Base input table	sn_spend_psd_procurement_request
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for procurement task skill

Generates context-aware email responses and provides ready-to-use templates for procurement tasks, helping fulfillers draft emails quickly while maintaining clear and professional communication.

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The following table lists the inputs for Email response for procurement task from Choose input for email response page in the AI Admin Hub console.

Email response for procurement task skill input

Input	Description
Base input table	sn_spend_psd_procurement_task
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for purchase requisition skill

Generates context-aware email responses and provides ready-to-use templates for purchase requisitions, enabling fulfillers to draft emails quickly while ensuring clear and professional communication.

The following table lists the inputs for Email response for purchase requisition from Choose input for email response page in the AI Admin Hub console.

Email response for purchase requisition skill input

Input	Description
Base input table	sn_shop_purchase_requisition
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for sourcing event skill

Generates context-aware email responses and provides ready-to-use templates for sourcing events, enabling fulfillers to draft emails quickly while ensuring clear and professional communication.

The following table lists the inputs for Email response for sourcing event from Choose input for email response page in the AI Admin Hub console.

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Email response for sourcing event skill input

Input	Description
Base input table	sn_shop_negotiation_event
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for sourcing request skill

Generates context-aware email responses and provides ready-to-use templates for sourcing requests, helping fulfillers draft emails quickly while maintaining clear and professional communication.

The following table lists the inputs for Email response for sourcing request from Choose input for email response page in the AI Admin Hub console.

Email response for sourcing request skill input

Input	Description
Base input table	sn_shop_sourcing_activity
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Email response for sourcing task skill

Generates context-aware email responses and provides ready-to-use templates for sourcing tasks, enabling fulfillers to draft emails quickly while ensuring clear and professional communication.

The following table lists the inputs for Email response for sourcing task from Choose input for email response page in the AI Admin Hub console.

Email response for sourcing task skill input

Input	Description
Base input table	sn_shop_sourcing_task

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Email response for sourcing task skill input (continued)

Input	Description
Base input fields	• Short description • Description • Emails • Additional comments • Work notes • Activity

Negotiation summarization for fulfillers skill

Inputs for the Negotiation summarization for fulfillers skill identify the table and fields that are used when the summary is generated for a negotiation.

The following table lists the inputs for the Negotiation summarization for fulfillers from the Choose input for negotiation page in the AI Admin Hub console.

Negotiation summarization for fulfillers skill input

Input	Description
Base input table	Negotiation [sn_shop_negotiation]
Base input fields	• Short description • Description • Supplier • Negotiation type • Negotiation objectives • Third party sourcing tool integration • Third party sourcing record • State • Work notes • Additional comments

Procurement case summarization for fulfillers skill

Inputs for the Procurement case summarization for fulfillers 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 for fulfillers from the Choose input for procurement case page in the AI Admin Hub console.

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Procurement case summarization for fulfillers skill input

Input	Description
Base input table	Procurement Case [sn_spend_psd_procurement_request]
Base input fields	• State • Short description • Description • Due date • Case type • Related case • Requested by • Supplier • Assigned to • Work notes • Additional comments • Emails

Purchase order summarization for requesters skill

Inputs for the Purchase order summarization for requesters skill identify the table and fields used when the summary is generated for a purchase order.

The following table lists the inputs for the Purchase order summarization skill for requesters from the Choose input for purchase order page in the AI Admin Hub console.

Purchase order summarization skill input

Input	Description
Base input table	Purchase Order [sn_shop_purchase_order]
Base input fields	• Supplier • Total amount • Status • ERP number

Purchase requisition summarization for fulfillers skill

Inputs for the Purchase requisition summarization for fulfillers 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 for fulfillers from the Choose input for purchase requisition page in the AI Admin Hub console.

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Purchase requisition summarization fulfillers skill input

Input	Description
Base input table	Purchase Requisition [sn_shop_purchase_requisition]
Base input fields	• Number • Short description • Description • State • Business owner • Order type • Requisition type • Supplier • Emails

Purchase requisition summarization for requesters skill

Inputs for the Purchase requisition summarization for requesters skill identify the table and fields used when the summary is generated for a purchase requisition.

The following table lists the inputs for the Purchase requisition summarization skill for requesters from the Choose input for purchase requisition page in the AI Admin Hub console.

Purchase requisition summarization skill input

Input	Description
Base input table	Purchase Requisition [sn_shop_purchase_requisition]
Base input fields	• Number • State • Short description • Business owner • Order type • Requisition type • Supplier • Total amount • Due date

Sentiment analysis for procurement case skill

Analyzes requester sentiment across procurement cases to help fulfillers prioritize urgent issues and make informed decisions. This capability delivers sentiment assessments, trend analysis,

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and AI-generated summaries that clearly explain the rationale behind each evaluation based on the scheduler frequency.

The following table lists the inputs for Sentiment analysis for procurement case from Choose input for sentiment analysis page in the AI Admin Hub console.

Sentiment analysis for procurement case skill input

Input	Description
Base input table	Procurement Case [sn_spend_psd_procurement_request]
Base input fields	• Short description • Description • Priority • State • Additional comments • Work notes • Activity

Sourcing event summarization for fulfillers skill

Inputs for the Sourcing event summarization for fulfillers skill identify the table and fields that are used when the summary is generated for a sourcing event.

The following table lists the inputs for the Sourcing event summarization for fulfillers from the Choose input for sourcing event page in the AI Admin Hub console.

Sourcing event summarization for fulfillers skill input

Input	Description
Base input table	Sourcing event [sn_shop_negotiation_event]
Base input fields	• Short description • Negotiation type • Description • Negotiation objectives • Third party sourcing record • Third party sourcing tool integration • Supplier responses close • State

Sourcing request summarization for fulfillers skill

Inputs for the Sourcing request summarization for fulfillers skill identify the table and fields used when the summary is generated for a sourcing request.

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The following table lists the inputs for the Sourcing request summarization for fulfillers skill from the Choose input for sourcing request page in the AI Admin Hub console.

Summarization for fulfillers skill input

Input	Description
Base input table	Sourcing Request [sn_shop_sourcing_activity]
Base input fields	• Business owner • Short description • Request type • Product category • Product name • Max budget • Purchased quantity • Product type • Status

Sourcing request summarization for requesters skill

Inputs for the Sourcing request summarization for requesters 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 for requesters from the Choose input for sourcing request page in the AI Admin Hub console.

Sourcing request summarization skill input

Input	Description
Base input table	Sourcing Request [sn_shop_sourcing_activity]
Base input fields	• Assigned to • Product category • Status • Supplier responses close • Short description • Max budget • Purchased quantity • Request type • Product type • Product name • Business owner

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Application plugins for AI capabilities in SPO

View the consolidated list of plugins required to use AI capabilities in Sourcing and Procurement Operations.

Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Application plugin list

Bundle	Application	Plugin dependencies
Foundation	SPO - Foundation (sn_ai_spo_fdn)	• ServiceNow Otto for Sourcing and Procurement Operations (com.snc.sn_spend_gen_ai) • Finance and Procurement - Foundation (com.snc.ai.fsc.foundation)
Prime	SPO - Prime (sn_ai_spo_prime)	• SPO - Foundation (com.snc.ai.spo.foundation) • Sourcing and Purchasing Automation (com.snc.sn_pr) • Finance and Procurement - Prime (com.snc.ai.fsc.prime)
	ServiceNow Otto for Sourcing and Procurement Operations (sn_spend_gen_ai)	• Now Assist for Platform (com.sn.now.platform) • Procurement Case Management (com.sn_spend_psd) • ServiceNow Otto for Finance and Procurement (com.snc.sn_fsc_genai)

Activate the Spend categorization agent

The Spend categorization agent predicts product and spend categories on purchase requisition lines. Complete the configuration tasks that activate the agent and its supporting prediction services in ServiceNow Otto for SPO.

The Spend categorization agent uses AI to predict the product category and spend category for items on purchase requisition lines, reducing manual data entry and helping avoid misclassification. The agent predicts the product category first, followed by the spend category. Predictions draw on machine learning solutions, taxonomy mappings, and text extracted from related attachments.

Why activation is needed

The Spend categorization agent and its supporting prediction capabilities are inactive when ServiceNow Otto for SPO is installed. Activation confirms that the underlying prediction solutions are ready, turns on the related AI skills, sets the prediction system properties, and makes the agent available in the ServiceNow Otto panel.

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Activation tasks

Complete the following tasks in the order listed. Each task confirms or enables one part of the prediction chain that the agent depends on.

- Confirm product category classification solutions: Confirm that the classification solution and AI Search configuration used to predict product categories are trained and active.
- Confirm spend category similarity solutions: Confirm that the similarity solution and retrieval configuration used to predict spend categories are trained and active.
- Activate Product and Spend category predictor skills: Activate the Product category predictor and Spend category predictor skills in AI Admin Hub.
- Confirm category prediction system properties: Confirm the system properties that control category prediction, including the confidence score threshold.
- Enable Spend categorization agent in ServiceNow Otto panel: Enable the Spend categorization agent so that users can run it from the ServiceNow Otto panel.

Confirm product category classification solutions

Confirm that the classification solutions and AI Search configuration for product category prediction are trained and active before activating the Spend categorization agent.

Before you begin

Role required: ml_admin or admin.

About this task

Product category prediction relies on machine learning classification solutions and an AI Search configuration for purchase lines. The agent predicts the product category before the spend category, so confirm these solutions before activating the related skills or the agent.

The following classification solutions have been added for product category prediction:

- **Product Category Classification For PRL** — identifies the most appropriate Product Category using product-related information for purchase request lines.
- **Product Category Classification For POL** — identifies the most appropriate Product Category using product-related information for purchase order lines.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. Locate **Product Category Classification For PRL**.
   This solution classifies purchase request lines into a product category based on product-related attributes such as product name, supplier product, and supplier.
3. Confirm that the solution status indicates a completed, trained version.
   A trained solution is available to generate predictions.
4. Locate **Product Category Classification For POL** and confirm that it is also trained and active.
   This solution performs the same classification for purchase order lines.
5. Confirm that the AI Search configuration for product category classification on purchase lines is published.
   The AI Search configuration provides the semantic index that supports product category prediction.
6. Review the prediction results or test output to confirm the solutions are ready.
   The solutions return product category predictions with confidence scores, which confirms they are ready for use by the agent.

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Result
The classification solutions (**Product Category Classification For PRL** and **Product Category Classification For POL**) and AI Search configuration for product categories are active and ready to support predictions from the Spend categorization agent.

Confirm spend category similarity solutions

Confirm that the machine learning similarity solutions and retrieval configuration used to predict spend categories are trained and active, so the Spend categorization agent can return spend category predictions.

Before you begin
The classification solutions for product category prediction are confirmed and active.

Role required: ml_admin or admin.

About this task
Spend category prediction relies on machine learning similarity solutions and a retrieval configuration that draw on product-to-spend category taxonomy mappings and similar past purchase lines. The agent predicts the spend category after the product category. Confirm these solutions before activating the related skills or the agent.

The following similarity solutions support spend category prediction:

- **Spend Category by PRL**: Predicts the appropriate Spend Category for purchase request lines by finding spend categories from similar purchase lines and taxonomy mappings.
- **Spend Category by POL**: Predicts the appropriate Spend Category for purchase order lines by finding spend categories from similar purchase lines and taxonomy mappings.

Procedure
1. Open the machine learning solutions list by navigating to **All** > **Predictive Intelligence** > **Solutions**.
2. Locate **Spend Category by PRL**.
   This solution finds spend categories from similar purchase request lines and taxonomy mappings rather than from a fixed set of classes.
3. Confirm that the solution status indicates a completed, trained version.
   A trained solution is available to generate predictions. If no trained version exists, train the solution before you continue.
4. Locate **Spend Category by POL** and confirm it is trained and active.
   This solution performs the same spend category prediction for purchase order lines.
5. Confirm that the AI Search configuration for spend category prediction is published.
   The AI Search configuration provides the semantic retrieval that supports spend category prediction.
6. Review the prediction results or test output for each solution to confirm they are ready.
   The solutions return spend category predictions with confidence scores, which confirms they are ready for use by the agent.

Result
The similarity solutions (**Spend Category by PRL** and **Spend Category by POL**) and retrieval configuration for spend categories are active and ready to support predictions from the Spend categorization agent.

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Activate Product and Spend category predictor skills

Activate the Product category predictor and Spend category predictor skills in AI Admin Hub to make both skills available to the Spend categorization agent.

Before you begin

Verify that the classification and similarity solutions for product and spend category prediction are active.

Role required: admin.

About this task

The Spend categorization agent uses two AI skills in the Category Prediction skill family. Each skill suggests a category for a fulfiller when the primary machine learning (ML) prediction doesn't meet the confidence threshold. Both skills are inactive by default.

Category Prediction AI skills

Skill	Description
Product category predictor	Suggests the most likely product category for a fulfiller when the primary prediction doesn't meet the confidence threshold.
Spend category predictor	Suggests the appropriate spend category for a fulfiller when the primary prediction doesn't meet the confidence threshold.

Procedure

1. Navigate to **All** > **AI Admin Hub**.
2. Open the ServiceNow Otto for Sourcing and Procurement Operations experience that contains the Category Prediction skills.
3. In the Finance and Supply Chain workflow group, select **Sourcing and Procurement Operations** to view the skills for the ServiceNow Otto for SPO features.
4. Select the **Product category predictor** skill.
   Verify the skill is in the Category Prediction skill family.
5. Set the skill to active.
   The Product category predictor skill is available to the agent.
6. Return to the skills list and select the **Spend category predictor** skill.
7. Set the skill to active.
   The Spend category predictor skill is available to the agent.

Result

Both Category Prediction skills are active and available to the Spend categorization agent.

Confirm category prediction system properties

Confirm the system properties that control product and spend category prediction, including the confidence score threshold and whether fallback logic is enabled.

Before you begin

The Product category predictor and Spend category predictor skills are active.

Role required: admin.

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About this task

Category prediction system properties

Property	Description
sn_spend_gen_ai.spend_category_confidence_score_threshold	Sets the confidence score threshold for product category or spend category prediction. Accepts a number from 0 through 100. The default value is 80.
sn_spend_gen_ai.enable_category_fallback_logic	Enables fallback logic for product and spend category prediction. When the value is set to true, the agent suggests a category when the primary prediction doesn't meet the confidence threshold. This property is set to true by default.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search for the *sn_spend_gen_ai.spend_category_confidence_score_threshold* property.
3. Confirm that the value is a number from 0 through 100.
   The default value is 80. A higher value applies predictions only when confidence is higher, which reduces the number of automatic updates.

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4. Search for the *sn_spend_gen_ai.enable_category_fallback_logic* property.
5. Confirm that the value is set to true.
   A value of true enables fallback logic and is the default. When fallback logic is enabled, the agent suggests a category if the primary prediction doesn't meet the confidence threshold.
6. **Optional:** If you change a value, save the property.
   The agent uses the updated property the next time it predicts a category.

Result
The confidence score threshold and fallback logic settings are confirmed, and the agent applies them when it predicts product and spend categories.

Enable Spend categorization agent in ServiceNow Otto panel

Enable the Spend categorization agent in AI Agent Studio so users can run it from the ServiceNow Otto panel to validate and update product and spend categories on procurement records.

Before you begin
Before you begin, verify the following:

- The prediction solutions are verified.
- The Category Prediction skills are active.
- The category prediction system properties are verified.

Role required: sn_aia.admin or admin.

About this task
The Spend categorization agent is inactive when installed. After you enable the agent in AI Agent Studio, users can run it from the ServiceNow Otto panel on procurement records to validate a category, review AI suggestions, and apply an update. Because the agent uses AI, its suggestions can be inaccurate, so users review and confirm a category before the category is applied.

Procedure
1. Open AI Agent Studio by navigating to **All** > **AI Agent Studio**.
2. Select the **Spend categorization agent** from the AI agents list.
   Review the agent details to verify it predicts product and spend categories on purchase requisition lines.
3. Verify that the agent is configured to run in the ServiceNow Otto panel.
   The agent is configured to run in the ServiceNow Otto panel and the virtual agent channel.
4. Enable the agent.
   The Spend categorization agent is active and available in the ServiceNow Otto panel.
5. Open a supported procurement record, then open the ServiceNow Otto panel to verify the agent is listed.
   The Spend categorization agent is listed and can validate or update the category for the record.

Result
Users can run the Spend categorization agent from the ServiceNow Otto panel to predict, validate, and update product and spend categories.

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Use ServiceNow Otto for Sourcing and Procurement Operations (SPO)

ServiceNow Otto for SPO is an AI assistant for procurement and sourcing tasks. You can access it through Shopping Hub, Virtual Agent chat, and Source-to-Pay Workspace.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

What ServiceNow Otto for SPO can do for you

ServiceNow Otto for SPO works with your product catalog and procurement data to:

Find products

Search your catalog using natural language instead of browsing categories.

For information on how to use ServiceNow Otto for SPO in a Virtual Agent chat, see Use ServiceNow Otto for Sourcing and Procurement Operations (SPO) in Virtual Agent.

Summarize records

Get quick overviews of purchase orders, requisitions, and supplier information.

For information on how to use ServiceNow Otto for SPO to summarize a record in Source-to-Pay Workspace, see Summarize a procurement record in Source-to-Pay Workspace.

For information on how to use ServiceNow Otto for SPO to summarize a record in Shopping Hub, see Summarize a procurement record in Shopping Hub.

Email context is applicable to purchase requisitions, procurement cases, and purchase orders: when one of these records has associated email records, the AI-generated summary and next steps automatically incorporate relevant email context (sender, date, key message). For purchase requisitions and procurement cases in Source-to-Pay Workspace, see Summarize a procurement record in Source-to-Pay Workspace. For purchase orders summarized by fulfillers using ServiceNow Otto for Finance and Procurement, see Summarize a procurement case.

Draft emails

Generate professional email responses to supplier inquiries and status requests.

For information on how to generate email response in ServiceNow Otto for SPO, see Generate an email response for procurement cases.

Analyze sentiment

Understand the tone of requester messages to prioritize issues and escalations.

For information on how to analyze sentiment in procurement cases, see Analyze sentiment in procurement cases.

Summarize a procurement record in Source-to-Pay Workspace

Get a quick overview of a procurement record's status, completed actions, and next steps, without reading through all the details. ServiceNow Otto for SPO generates a focused summary in seconds.

Before you begin

Role required: sn_spend_gen_ai.now_assist_fulfiller

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About this task

The summary appears in different places depending on which interface you're using:

- Core UI: The summary appears in a banner at the top of the record.
- Source-to-Pay Workspace: The summary appears in the **Details** tab.

What the summary includes

Based on the type of procurement record, ServiceNow Otto for SPO generates a summary with the following sections:

- **Overview**: Information about the record.
- **Actions completed**: Actions that have been taken so far.
- **Next steps**: Actions you need to do next for open cases. For purchase requisitions and procurement cases, if the record has associated email records, this also factors in the sender, date, and key message from those emails (excluding standard state-change notifications).
- **Close notes**: Complete resolution summary for closed procurement cases.

Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

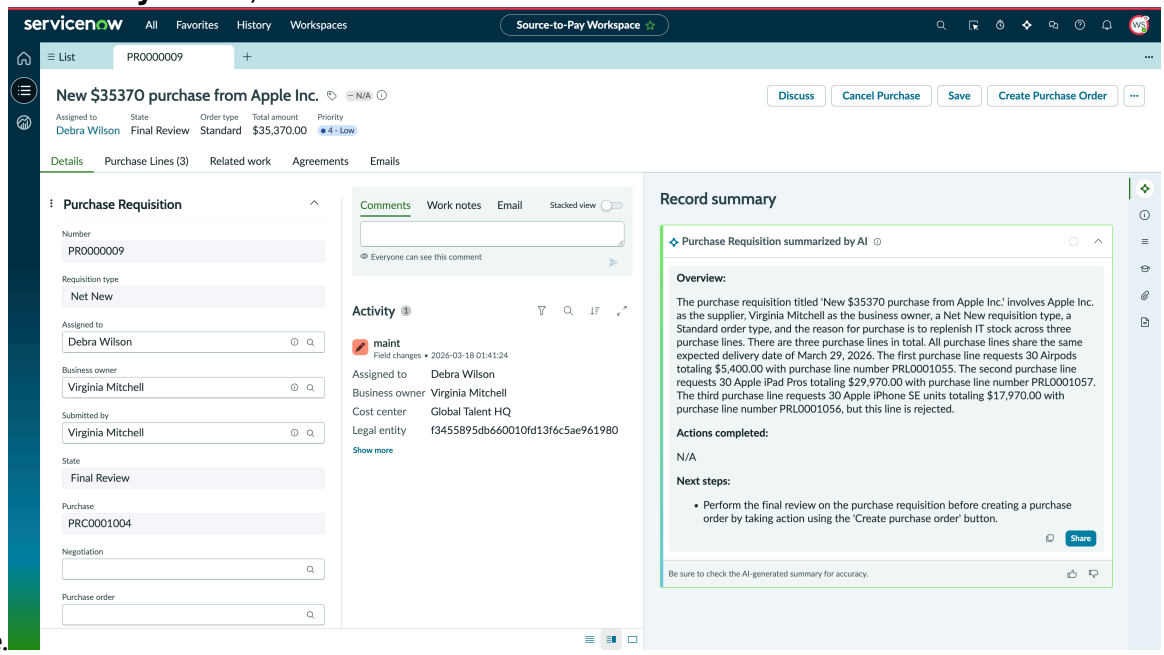
List actions

To	Do this
To generate a summary for the following procurement records: ○ Negotiation ○ Procurement case ○ Procurement task ○ Purchase requisition ○ Sourcing event ○ Sourcing request ○ Sourcing task	**a.** Navigate to **Lists** > **All work**. **b.** Select the type of record you want to summarize: ▪ Cases ▪ Negotiations ▪ Requisitions ▪ Sourcing events ▪ Sourcing requests **c.** Select the record number in the **Number** column to open it.

4. Navigate to the **Details** tab.

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5. In the **Record summary** section, select **Summarize**.



ServiceNow Otto for SPO begins generating your summary. This typically takes a few seconds. The summary will appear on screen once complete.

6. Review the summary details.

7. **Optional:** After ServiceNow Otto for SPO generates the summary, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the record work notes	**a.** Select **Share**. **b.** In the **Share to work notes** dialog box, edit the summary if needed. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill.
Copy the record summary	Select the copy to clipboard icon ( ) to use the record summary information for another purpose, such as pasting into an email.

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Option	Procedure
View the information about the record summary	If you want to check some details about the summary, select the more info icon ( ).
Refresh the record summary	If you want to refresh the summary, select the refresh icon ( ).

Summarize a procurement record in Shopping Hub

As a shopper, use the record summarization skills in the ServiceNow Otto for Sourcing and Procurement Operations (SPO) application to summarize sourcing request, purchase requisition, and purchase order records. View their status, progress, and action items at a glance.

Before you begin

Role required: sn_spend_gen_ai.now_assist_requester

About this task

You can use these record summarization skill in either Core UI or Shopping Hub.

- In Core UI, the summary appears in a banner in the record.
- In Shopping Hub, the summary is generated in a widget in the record.

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Select **My purchases** from your Shopping Hub profile.
3. Do one of the following:

To	Do this
To generate a summary for a sourcing request records.	Select a sourcing request record to view it.
To generate a summary for purchase requisition record.	Select a purchase requisition record to view it.
To generate a summary for purchase order record.	Select a purchase order record to view it.

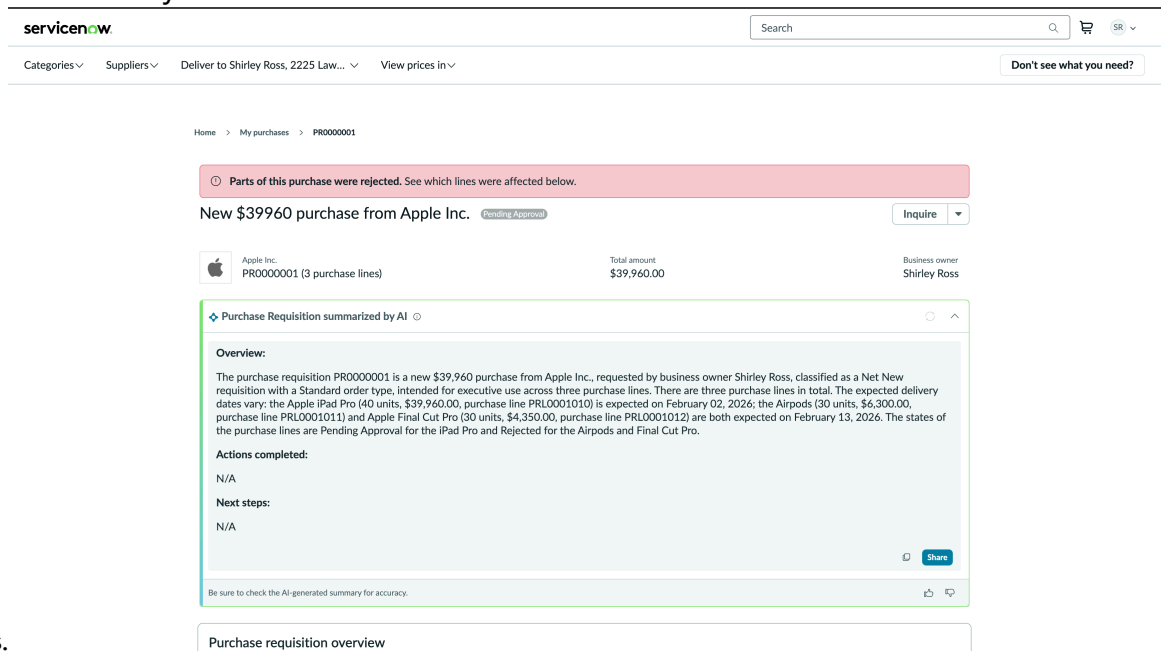
   On the sourcing request or purchase requisition record, a widget is displayed with the Summarize option.

4. Select **Summarize**.

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 its overview and next steps you need to take. The information that is displayed is based on the type of the record.

- Overview: Provides information about the record.
- Your next steps: Lists the actions that the shoppers need to take next.

6. **Optional:** When you finish summarizing a record, you can add it to the activity, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill.
Copy the record summary	Select the copy to clipboard icon ( ) to use the record summary information for another purpose, such as pasting into an email.
View the information about the record summary	If you want to check some details about the summary, select the more info icon ( ).

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Request the generative AI capabilites in ServiceNow Otto for Sourcing and Procurement Operations (SPO) by using ServiceNow Otto panel

Request the contextual generative AI capabilities to summarize procurement-related records in the ServiceNow Otto for Sourcing and Procurement Operations (SPO) application by using the conversational interface in the ServiceNow Otto panel.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

Make sure that AI search and ServiceNow Otto panel are enabled in the instance.

Role required: sn_spend_gen_ai.servicenow_otto_fulfiller

About this task

You can use the ServiceNow Otto panel in Source-to-Pay Workspace to summarize procurement-related records.

For more information about the ServiceNow Otto panel, see ServiceNow Otto panel. For information about activating the ServiceNow Otto panel standard chat.

Procedure

1. Log in to an instance where the ServiceNow Otto for SPO application is installed.
2. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
3. Request the generative AI capabilities in SPO for procurement-related records for the following skills by selecting the ServiceNow Otto icon ✦:
   - Sourcing request summarization for fulfillers
   - Purchase requisition summarization for fulfillers
   - Procurement case summarization for fulfillers
   - Negotiation summarization for fulfillers
   - Sourcing event summarization for fulfillers
4. After you request the generative AI capabilities, you can summarize procurement-related records.

Option	Description
Summarize a record	**a.** Open a record. **b.** From the header menu, select the Service Now Otto icon ✦. **c.** In the ServiceNow Otto panel, select **Sum marize a record**.

Use ServiceNow Otto for Sourcing and Procurement Operations (SPO) in Virtual Agent

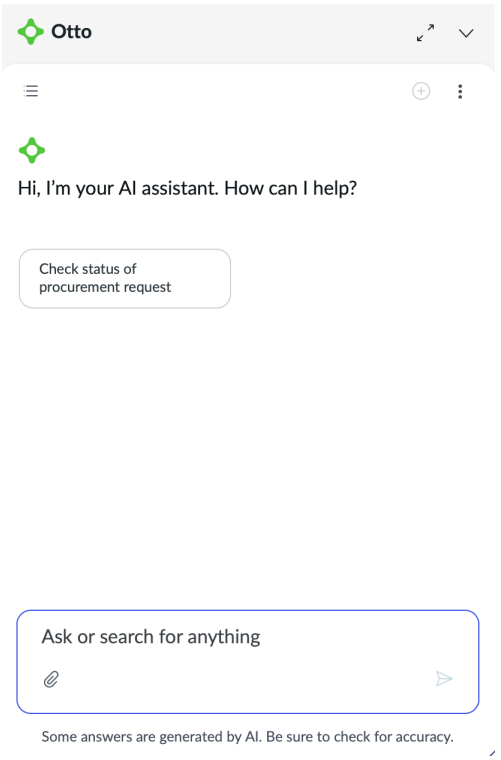
ServiceNow Otto is a chat assistant that helps you complete procurement tasks through conversation. Instead of navigating forms or contacting procurement staff, you can use ServiceNow Otto for Sourcing and Procurement Operations (SPO) to request products, track orders, and get help with procurement questions.

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Note: ServiceNow Otto for SPO uses generative AI to interpret your requests and generate responses. Results may not always be accurate. Review any procurement information before submitting a request.

Start a conversation with ServiceNow Otto for SPO

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the Virtual Agent chat icon ( ).
3. In the chat, select a suggested topic or type what you need.



ServiceNow Otto for SPO interprets conversational input, so you can phrase requests different ways. For example:

- `I need to buy office supplies`
- `I want to order a desk lamp`
- `Show me how to request a product`

For more information, see Using ServiceNow® Otto for Virtual Agent.

Request and buy a product

You can make a purchase through the guided conversation in ServiceNow Otto for SPO.

1. Select the Virtual Agent chat icon ( ).
2. In the chat, type a message such as `I want to buy a product` or `Show me how to request something`.
3. ServiceNow Otto for SPO displays matching options in a card carousel.
4. Select the option that matches what you need.

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If the product is in your catalog:

1. ServiceNow Otto for SPO prompts you for purchase details, including quantity, delivery location, delivery date, and reason.
2. Answer each question in the chat.
3. After you answer all questions, ServiceNow Otto for SPO displays a summary of your request.
4. Select **Submit** to complete the purchase request.

You can then track this request from Shopping Hub, Employee Center, or the Platform home page.

To learn more about quick checkout and sourcing checkout processes, see Order a product with quick checkout and Complete sourcing checkout.

If the product is not in your catalog:

1. ServiceNow Otto for SPO gathers information about what you need.
2. ServiceNow Otto for SPO checks whether the product has a quote available.
3. If a quote is found, ServiceNow Otto for SPO routes you to request the item.
4. If no quote is found, ServiceNow Otto for SPO provides a form to submit an off-catalog request.

For more information on off-catalog intake forms, see Requesting for products or services that you don't see on ShoppingHub.

Ask the procurement team a question

If you need help with a product or have a question, you can submit it directly to your procurement team through the chat.

Note: You need the sn_spend_psd.requester role to submit questions to the procurement team. Check with your administrator if you are not sure whether you have this role.

To submit a question:

1. In the chat, describe what you need or type your question.
2. Attach documents if relevant.
3. Select **Submit**.

ServiceNow Otto for SPO creates a procurement case with your question and attachments. Your procurement team reviews and responds.

Track your orders and requests

Check the status of your purchases at any time through ServiceNow Otto for SPO.

1. Select the Virtual Agent chat icon ( ).
2. In the chat, type a message such as `Track my order` or `Show me my requests`.
3. ServiceNow Otto for SPO prompts you to select what you want to track:

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- Check status of procurement request
- Procurement request tracking AI agent

4. ServiceNow Otto for SPO displays your recent records with status. Select any record to see more details.

Related resources

To learn how a conversation powered by generative AI works in Virtual Agent, see Using ServiceNow® Otto for Virtual Agent.

As an administrator, you can use the ServiceNow Otto for Virtual Agent Analytics dashboard to monitor the performance of ServiceNow Otto for Virtual Agent as a self-service deflection tool. To learn more, see Using AI Analytics. The dashboard calculates the conversation deflection rate based on the resolution status associated with ServiceNow Otto query responses.

For detailed information on ServiceNow Otto for SPO, see Explore ServiceNow Otto for Sourcing and Procurement Operations (SPO).

For information on configuring ServiceNow Otto for SPO, see Configure ServiceNow Otto for Sourcing and Procurement Operations (SPO).

Generate an email response for procurement cases

Enables procurement specialists and buyers to generate professional, accurate email responses using ServiceNow Otto. By minimizing manual drafting and review, it helps procurement specialists and buyers respond to requester inquiries more efficiently and focus on higher-value procurement tasks.

Before you begin

Role required: sn_spend_gen_ai.now_assist_fulfiller

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

List actions

To	Do this action
To generate an email response for the following records: ○ Negotiation ○ Procurement case ○ Procurement task ○ Purchase requisition ○ Sourcing event ○ Sourcing request ○ Sourcing task	**a.** Navigate to **Lists** > **All work**. **b.** Select one of the following modules and select the record link in the **Number** column. ▪ Cases ▪ Negotiations ▪ Requisitions ▪ Sourcing events ▪ Sourcing requests ▪ Tasks

4. On the **Details** tab, select **Email**.

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5. Select anywhere within the email message window to see the ServiceNow Otto icon.
6. To generate a context-based email response, select the ServiceNow Otto icon.
7. To refine an email draft, select the ServiceNow Otto icon and then select any of the available options:
   - Elaborate
   - Shorten
   - Change tone
8. Select **Insert** to add the AI-generated email response to the email message window.
9. **Optional:** Apply templates by selecting the template icon.
10. Select **Send email** to send the email.

Result
An AI-generated email response is sent to the requester.

Analyze sentiment in procurement cases

Analyze requester sentiments on active procurement cases to help procurement specialists quickly identify, prioritize, and track sensitive requests.

Before you begin
Role required: sn_spend_gen_ai.now_assist_fulfiller

Procedure
1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **All work** > **Cases**.
4. Select any active procurement case.
   The procurement case form view appears.
5. To see why the sentiment was generated, select the information icon.
6. **Optional:** To refresh the sentiment and trend manually, select the information icon and then select the refresh icon.
   A red dot indicates that the sentiment was updated due to recent activity. Sentiment updates automatically every 30 minutes.

AI L1 SPO Service Desk Specialist

The AI L1 SPO Service Desk Specialist processes general inquiry procurement cases by searching knowledge resources and delivering resolutions with high confidence, reducing manual case handling.

When a requester submits a general inquiry case, the AI L1 SPO Service Desk Specialist investigates the issue. It retrieves relevant information from published knowledge base articles and the FSC Common knowledge graph. If the agent determines that the case can be resolved with sufficient confidence, it posts the resolution in the **Activity** section and closes the case. If not, it assigns the case to Procurement Service Management assignment group, and routes it to a fulfiller for review.

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Plugins

To use the AI L1 SPO Service Desk Specialist, install the following plugins:

- ServiceNow Otto for Sourcing and Procurement Operations (`com.snc.sn_spend_gen_ai`)
- Zero Touch Service Desk (`com.snc.sn_ztsd`)

Automated case resolution workflow

The AI L1 SPO Service Desk Specialist processes a general inquiry procurement case in the following steps.

1. A requester submits a general inquiry through Employee Center or an email.
2. Assignment rules route the case to the AI L1 SPO Service Desk Specialist.
3. The agent retrieves case information and determines the inquiry context.
4. The agent searches published knowledge base articles and the FSC Common knowledge graph for relevant guidance. For more information about knowledge graphs, see Knowledge Graph.
5. The agent provides a resolution with helpful reference links in the **Resolution Notes** section. This gives the requester quick access to supporting documentation.
6. The agent routes the case based on confidence scoring:
   - Score greater or equal to 4: The case state changes to **Awaiting Acceptance**. The resolution is sent to the requester for acceptance and the case switches to read-only mode.
   - Score lower than 3: The case state changes to **Draft**. The agent assigns the case to the Procurement Service Management assignment group for fulfiller review.
7. The requester receives the resolution by email and can access it in **My Tasks** in Employee Center or in the **To-Do** tab of the inquiry case.

Case resolution outcomes

The outcome of the resolution process depends on the requester's response and Advanced Work Assignment configuration:

- Accepted by requester: The case closes and is marked as **Closed Completed**.
- Confidence score below 3 with Advanced Work Assignment active: The case state changes to **Draft** and routes to the Advanced Work Assignment queue for fulfiller review.
- Rejected with Advanced Work Assignment active: The case state changes to **Draft** and moves to the Advanced Work Assignment queue. For more information on Advanced Work Assignment, see Advanced Work Assignment for Source-to-Pay Operations.
- Rejected with Advanced Work Assignment inactive: The case state changes to **Draft**, and is unassigned from the agent.
- No response within 72 hours: A scheduled job closes the case as **Closed Completed**.

View AI L1 SPO Service Desk Specialist progress

Track the steps the AI L1 SPO Service Desk Specialist performs when processing a procurement case.

Before you begin
Role required: sn_shop.procurement_specialist

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Procedure

1. Navigate to **All** > **Sourcing and Procurement Operations** > **Source-to-Pay Workspace**.
2. Select the list icon.
3. Open a general inquiry case assigned to the AI L1 SPO Service Desk Specialist.
4. In the contextual side panel, select the Agentic Processes ( ) icon.
5. Select **Zero Touch Service Desk Agent** to view the agent's activity details.
6. Select **Show steps** to view the steps the agent performed to investigate the request.
7. In the **Review output** section, review the generated response.

Edit Knowledge Graph tags

Customize the instructions that the AI L1 SPO Service Desk Specialist uses to retrieve information by editing FSC Common Knowledge Graph tags.

Before you begin

Role required: kg_admin

About this task

FSC Common Knowledge Graph Tags is a collection of tables that help the AI L1 SPO Service Desk Specialist interpret the context and content of different tables. Edit these tags to add or update tables, table synonyms, column descriptions, and other instructions that improve the accuracy of AI responses.

Procedure

1. Navigate to **All** > **Knowledge Graph Designer** > **Enterprise Graph Tags**.
2. Select **FSC Common KG Tags** to open it in the Knowledge Graph canvas.
   The canvas displays all tables that are part of the tag.
3. Open the tag for editing.
   - To edit the tag, select **Edit tag**.
   - To edit a node, select the node. The Tag configuration section appears in the right pane.
4. Update the tag details as needed, including table synonyms, column names, and instructions. Instructions you add help the AI L1 SPO Service Desk Specialist interpret the context of the table when processing procurement inquiries.
5. Select **Update Tag** to save your changes.

Generate a knowledge article

ServiceNow Otto for Sourcing and Procurement Operations (SPO) generates knowledge articles from closed procurement cases in Source-to-Pay Workspace.

Knowledge articles capture resolution details from closed procurement cases. Teams can resuse that information for similar issues. ServiceNow Otto for Sourcing and Procurement Operations (SPO) supports the following approaches for generating knowledge articles:

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- From a procurement case: Generate a knowledge article directly from a closed procurement case in Source-to-Pay Workspace. You can include related tasks from the case in the generated article.
- From multiple procurement cases: Generate a knowledge article from multiple closed procurement cases in Source-to-Pay Workspace.
- From the ServiceNow Otto panel: Generate a knowledge article from the ServiceNow Otto panel without navigating to a specific case.

Related topics

Generate a knowledge article from a closed procurement case

Generate a knowledge article from multiple procurement cases

Generate a knowledge article from the ServiceNow Otto panel

Generate a knowledge article from a closed procurement case

Generate a draft knowledge article from a closed procurement case using ServiceNow Otto for Sourcing and Procurement Operations (SPO), then review and publish it to the knowledge base.

Before you begin

- A procurement case assigned to you in **Closed Completed** state.
- Source-to-Pay Workspace configured with knowledge article generation enabled.

Note: ServiceNow Otto generates knowledge article drafts using AI. Review and verify all content for accuracy before publishing.

Role required: sn_spend_gen_ai.now_assist_fulfiller

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) to view your cases.
3. Open a closed procurement case.
4. Select **Create Knowledge**.
   This option appears only when the case has no associated knowledge article.
5. In the dialog box, select **Draft with AI**.
   If additional relevant tasks exist, they appear. You can select up to five tasks to include in the knowledge article.
6. Select the tasks to include in the knowledge article.
   a. Select the tasks you want to include, then select **Continue with selected tasks**.
   b. Select **Continue without more tasks** to proceed without additional tasks.
   The generated article opens in a new tab with a unique ID and is automatically linked to the case.
7. Review the article and edit as needed.
   Verify the accuracy of all AI-generated article content.
8. Select **Save**.
9. Select **Publish**.
   A confirmation message appears. The article is published and available in the knowledge base.

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Result
Your knowledge article is published, linked to the case, and discoverable in the knowledge base.

Trouble?

If article generation fails:

- Verify that knowledge article generation is configured in your ServiceNow instance.
- Confirm the procurement case is in **Closed Completed** state.
- Try again.

If the issue persist, contact your administrator.

Generate a knowledge article from multiple procurement cases

Use ServiceNow Otto for Sourcing and Procurement Operations (SPO) to generate a single knowledge article from multiple closed procurement cases in the Source-to-Pay Workspace.

Before you begin

- One or more procurement cases assigned to you in **Closed Completed** state.
- Source-to-Pay Workspace configured with knowledge article generation enabled.

Note: ServiceNow Otto generates knowledge article drafts using AI. Review and verify all content for accuracy before publishing.

Role required: sn_spend_gen_ai.now_assist_fulfiller

About this task
Generate a knowledge article from multiple related procurement cases to create comprehensive documentation that addresses common issues. This workflow builds your knowledge repository from a set of closed cases rather than one case at a time.

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Knowledge** > **Create new article**.
2. In the dialog box, select **Draft with AI**.
3. Select a closed procurement case from the list.
4. In the **Search from tasks** field, enter keywords to find cases.
   Cases matching your search criteria appear in the results list.
5. Select the closed procurement cases to combine into a single knowledge article.
   Select cases that address similar issues or resolutions.
6. Select **Continue with selected tasks**.
7. Review the article and edit as needed.
8. Select **Submit**.
   A message appears indicating that the knowledge article is saved as a draft and linked to all selected cases.
9. Select **View Article** to open the draft article.
10. Make any final edits to the article.
11. Select **Publish**.
    A confirmation message appears. The article is published and available in the knowledge base.

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Result
The published knowledge article is linked to all selected cases and available in the knowledge base.

Trouble?

If article generation fails:

- Verify that knowledge article generation is configured in your ServiceNow instance.
- Confirm the procurement case is in **Closed Completed** state.
- Try again.

If the issue persist, contact your administrator.

Generate a knowledge article from the ServiceNow Otto panel

Generate a draft knowledge article from a closed procurement case using the ServiceNow Otto panel, then review and publish it to make it available in the knowledge base.

Before you begin

- A procurement case in **Closed Completed** state assigned to you.
- Source-to-Pay Workspace configured with knowledge article generation enabled.

Note: ServiceNow Otto uses AI to generate knowledge article drafts. Review and verify all generated content for accuracy before publishing.

Role required: sn_spend_gen_ai.now_assist_fulfiller

Procedure

1. Open the ServiceNow Otto panel by selecting the AI sparkle icon.
2. Enter the case number of a closed procurement case.
   Alternatively, open the closed procurement case first, then open the ServiceNow Otto panel from within the case.
3. In the panel, select **Generate Article**.
   ServiceNow Otto for Sourcing and Procurement Operations (SPO) generates a draft knowledge article with a unique ID.
4. Select **View KB article** to open the draft.
5. Review the knowledge article and edit as needed to verify accuracy.
6. Select **Save** to save the draft.
7. Select **Publish** to publish the article.

Result
Your knowledge article is published, linked to the case, and discoverable in the knowledge base.

Use agentic workflows in ServiceNow Otto for Sourcing and Procurement Operations (SPO)

Use agentic workflows in ServiceNow Otto for Sourcing and Procurement Operations (SPO) to streamline procurement through intelligent product recommendations, guided checkout, off-catalog purchasing, and access to detailed product information. These workflows also assist with procurement-related inquiries and help you track associated records efficiently.

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Available agentic workflows for Sourcing and Procurement Operations AI Agent Collection

Agentic workflow name	Description	Available AI agents
Conversational intake for sourcing and procurement	Addresses your procurement needs by offering product recommendations, guided checkout, off-catalog request support, and detailed product information. It also responds to inquiries and tracks related records.	• Procurement request tracking AI agent • Procurement request path recommendation • Procurement inquiry analysis AI agent
Savings Opportunity Discovery	Scans contracts, spend, and supplier data on a recurring schedule to surface ranked savings opportunities for category managers to review, act on, or dismiss.	• Contract Optimization Opportunity Finder Agent • Spend Optimization Opportunity Finder Agent • Supplier Optimization Opportunity Finder Agent

To run the AI agents autonomously, you must activate the agentic workflow. For more information, see Enable AI agents for the Conversational intake for sourcing and procurement agentic workflow in the ServiceNow Otto panel.

For more information about savings opportunities and how the Opportunity Finder agents work, see Savings opportunity identification.

For more information about the AI agents, see AI Agent Studio (legacy).

Important: By default, all agentic workflows and AI agent records are read-only.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Conversational intake for sourcing and procurement agentic workflow

The Conversational intake for sourcing and procurement agentic workflow addresses your procurement needs by providing product recommendations, guided checkout, off-catalog processes, and detailed product information. It also answers questions and tracks related records.

Conversational intake for sourcing and procurement agentic workflow overview

The Conversational intake for sourcing and procurement agentic workflow handles and resolves procurement inquiries, including product information, purchase requests, new item sourcing, and purchase tracking.

Accessing the Conversational intake for sourcing and procurement agentic workflow

To access the agentic workflow:

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1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Conversational intake for sourcing and procurement**.

Available AI agents in the Conversational intake for sourcing and procurement agentic workflow

The following table lists the agents that are used in the Conversational intake for sourcing and procurement agentic workflow.

Important: In the Define availability screen for the AI agent, make sure that the Status toggle is enabled to activate the AI agent.

AI agents used in the Conversational intake for sourcing and procurement agentic workflow

AI agent	Description
Procurement request tracking AI agent	Handles tracking-related queries throughout the procurement life cycle. Identifies and responds to requests for tracking, status checks, updates, or follow-ups on procurement records, such as sourcing requests, purchase requisitions, purchase orders, and procurement cases. Understands the query context to retrieve the relevant record, even when a record number isn't provided, and displays a direct link to the record.
Procurement request path recommendation	Handles procurement-related intents by identifying explicit or implicit requests to buy or source products or services. It displays up to three product or service options based on minimal user input. It then guides users through the appropriate procurement flow. You can request for multiple items in one request. After presenting recommendations, it checks user interest and triggers either a sourcing or purchasing plan based on internal rules. On your confirmation, it creates the relevant record and displays the plan. You can add multiple attachments in PDF, PNG, JPEG, Word, XLSX, or ZIP format when submitting your request to include any additional information.
Procurement inquiry analysis AI agent	Retrieves and displays relevant knowledge articles to address sourcing and procurement queries. If no relevant articles are found, or if intent is unclear, redirects you to a live agent.

The AI agent decision log displays the AI agents that are working on a request. You can watch their interactions, decisions, and thought processes as they happen in real time.

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Tools mapped to the Procurement request tracking AI agent

Tools used in the Procurement request tracking AI agent

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Get records data	Searches the Knowledge Graph for procurement records that match a generated query, returning relevant links and details.
Scripts	Autonomous	Record summary	Summarizes the information provided, confirming that the summary captures the key details and intent of an inquiry.

Tools mapped to the Procurement request path recommendation

Tools used in the Procurement request path recommendation

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Check DocIntel task	Checks the status of the Document Intelligence task created by createDocumentTask.
Scripts	Autonomous	Create purchasing record	Creates purchasing records from the finalized plan (with optional attachments) and returns a submission summary.
Scripts	Autonomous	Show more results	Displays additional product recommendations for a selected item.
Scripts	Autonomous	Created record from document	Creates records once the document task is submitted.
Scripts	Autonomous	Create sourcing record	Creates sourcing requests from the finalized plan (with optional attachments) and returns a submission summary.
Scripts	Autonomous	Build Purchase Plan	Builds the purchase checkout plan after the Document Intelligence task has completed. Resolves and validates delivery period, delivery address, purchase reason, and cost center from user inputs. Saves the final plan to the conversation cache and returns a formatted purchase plan summary.
Scripts	Autonomous	Recommendation	Generates a list of products based on the product name, additional details, and supplier preferences.
Scripts	Autonomous	Channel decision and plan creation	Determines the optimal checkout channel and create a plan based on the selected product or the rejection of recommended options, returning the recommended checkout channel for each selection.
Scripts	Autonomous	Document type extractor	Determines type of document uploaded.

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Tools used in the Procurement request path recommendation (continued)

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Create a document task	Creates a document task that gathers delivery period and purchase reason information.
Conversational topics	Autonomous	Quote or Sow attachment	Supports adding a quote or SOW document by passing the uniquely generated document conversation ID (documentConversationId) as input to the tool.
Conversational topics	Autonomous	add or update attachment	Adds or updates attachments and supporting documents using a unique system-generated ID for caching and efficient document management.

Tools mapped to the Procurement inquiry analysis AI agent

Tools used in the Procurement inquiry analysis AI agent

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Get relevant knowledge article	Retrieves and displays relevant knowledge articles for sourcing and procurement queries.
Scripts	Autonomous	Connect to live agent	Escalates to a live SPO agent on user request.
Scripts	Autonomous	Redirect to Employee Center	Politely deflects unsupported requests and directs users to Employee Center resources.

Enable AI agents for the Conversational intake for sourcing and procurement agentic workflow in the ServiceNow Otto panel

Enable AI agents in the ServiceNow Otto panel to help you manage procurement requests more efficiently, with faster response times and smarter support.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Under Agentic workflows, select **Conversational intake for sourcing and procurement**.

   If you want to modify this agentic workflow, you can duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow.

3. On the Describe and connect page, select **Continue**.
   The Describe and connect page is read-only.
4. On the Defined trigger page, select **Continue**.
   The Define trigger page is read-only.

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5. On the Select display page, switch the Display toggle to the open position so that the AI agents are enabled in the ServiceNow Otto panel.
6. In the **Who can access from the ServiceNow Otto panel?** field, enter `now_assist_panel_user`.

   In addition to the now_assist_panel_user role, you can assign any role to access the ServiceNow Otto panel.
7. Activate the agentic workflow by selecting **Save and test**.
   The AI agents are enabled in the ServiceNow Otto panel.

Enable AI agents for the Conversational intake for sourcing and procurement agentic workflow in Virtual Agent

Enable AI agents in Virtual Agent to streamline procurement requests, providing quicker support and a more efficient experience for requesters through intelligent assistance.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Under Agentic workflows, select **Conversational intake for sourcing and procurement**.
3. Under Connect AI agents, select any of the AI agents that you want to make available in Virtual Agent.
   The agents that you can select:
   - Procurement request tracking AI agent
   - Procurement request path recommendation
   - Procurement inquiry analysis AI agent
4. On the Describe and instruct page, select **Continue**.
   The Describe and instruct page is read-only.
5. On the Add tools and information page, select **Continue**.
   The Add tools and information page is read-only.
6. On the Describe and instruct page, select **Continue**.
   The Describe and instruct page is read-only.
7. On the Define trigger page, select **Continue**.
   The Describe trigger page is read-only.
8. On the Define availability page, in the **Select display** section, switch the Display toggle to the open position so that the AI agent is enabled in the Virtual Agent.
9. To activate the agentic workflow, select **Save and test**.
   The selected AI agent is enabled in Virtual Agent.

What to do next

Verify that the selected AI agent has been enabled. For more information, see .

Submit a purchase request using the ServiceNow Otto AI agent

Use the ServiceNow Otto AI-powered chat experience in the Employee Center to submit a purchase request. The AI agent analyzes your requirements, displays suitable products or services, and guides you through confirming and submitting the request.

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Before you begin
Role required: sn_spend_gen_ai.now_assist_requester

Procedure
1. In your ServiceNow instance, navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center interface, select the ServiceNow Otto chat icon ( ).
3. In the chat window, describe the product or service that you want to purchase.
   You can request more than one product or service in the same purchase request.
4. When prompted, enter **No** to proceed without a quote or Statement of Work.
   ServiceNow Otto analyzes your input using the Procurement request path recommendation and displays up to three products or services.
5. Select **Show** to view the products.
   ServiceNow Otto shows the top three products or services categorized as an excellent match or good match in the engagement layer.
6. Select the product or service that you want to purchase.
7. Select **Submit** to confirm details, such as quantity, supplier, total price, and delivery period.
8. **Optional:** Select **Edit** to make changes and then enter **Submit**.
9. **Optional:** When prompted to add attachments, select **Yes** to upload supporting files.
   You can add multiple attachments in PDF, PNG, JPEG, Word, XLSX, or ZIP format.
10. Select **No** to submit the purchase request without attachments.

Result
The purchase request is successfully submitted through Employee Center using the ServiceNow Otto AI agent.

Submit a purchase request by uploading a SOW

Upload a statement of work (SOW) through the ServiceNow Otto chat interface in Employee Center to submit a purchase request for review.

Before you begin
Role required: sn_spend_gen_ai.now_assist_requester

About this task
ServiceNow Otto uses AI to analyze your SOW and recommend a procurement request path. AI-generated results may not always be accurate. Review all extracted information before submitting your request.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the ServiceNow Otto chat icon ( ) in the Employee Center interface.
3. Enter details about the product you want to purchase in the chat interface.
4. When prompted, enter `Yes` to proceed with uploading a SOW.
5. Select **Click here to upload a file**.

   Note: The file must be in PDF, PNG, or JPEG format and must not exceed 1 MB.

6. Select a SOW from your device.

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ServiceNow Otto processes your document using the Procurement request path recommendation.

7. Enter additional details in the chat, such as the reason for purchase, expected delivery date, and service period.
8. **Optional:** Select **Show** to review the request details.
   The additional details are displayed in the engagement layer.
9. **Optional:** Edit the request details before submitting.

   a. Select **Make changes**.

   b. Select the document link.
   The SOW document opens in a new tab.

   c. Select **Edit Answers**.

   d. Select **Submit**.

   e. Select **Confirm and submit** to save your changes.

   f. Return to Employee Center and enter `Yes` to proceed.

10. Select **Submit** to submit the request.
    Your purchase requisition is created and submitted for approval.

Submit a purchase request by uploading a quote

Use the ServiceNow Otto chat interface in the Employee Center to describe your needs, upload a quote, and submit a purchase request. ServiceNow Otto processes the uploaded quote and creates a purchase requisition for your review. Review all extracted information before submitting, as AI-generated output may require correction.

Before you begin

Role required: sn_spend_gen_ai.now_assist_requester

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the ServiceNow Otto chat icon ( ).
3. In the chat interface, enter details about the product to purchase.
   ServiceNow Otto displays product recommendations through the Procurement request path recommendation.
4. Select **Yes** to upload a quote.

   Note: If your quote contains more than 50 products, set the *glide.sc.multirow_set.rows.size* system property to a value greater than the total number of products in the quote. If the *glide.sc.multirow_set.rows.size* system property does not exist, add it and set the type to Integer.

   For more information on system properties, see Add a system property .

5. Select **Click here to upload a file** to choose your quote from your device.

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Enter additional details, such as the reason for purchase, expected delivery date, and service period.

Note: The file must be in PDF, PNG, or JPEG format and must not exceed 1 MB.

6. Verify the quote file name.
   ServiceNow Otto processes the quote and extracts the details for review.
7. Select the link to open the extracted quote it in a new tab.
8. Verify that all information was extracted correctly.
   Review the extracted product details, quantities, and pricing before submitting. AI-generated extractions may contain errors.
9. Select **Submit**.
10. Close the tab and return to the Employee Center.

    Select **Yes** to confirm you have submitted the extracted quote.

Result

A purchase requisition is created and submitted for approval. Review the requisition details to verify the AI-extracted information is accurate before the approval process begins.

Update the product category or spend category in the ServiceNow Otto panel

Use the ServiceNow Otto panel to update the product category or spend category for purchase requisitions, sourcing requests, or purchase orders directly from the Source-to-Pay Workspace.

Before you begin

Role required: sn_shop_procurement_specialist

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **List** > **All work** and locate the required record.

   a. Select from the following modules:
      - Sourcing requests
      - Requisitions

   b. In the **Number** column, select the record link to open the details page.

4. To open the ServiceNow Otto panel, select the ServiceNow Otto icon .
5. In the ServiceNow Otto panel, enter a request to update either the product category or spend category.
6. Select **Product Category** or **Spend Category**, based on your requirement.
7. When prompted, enter the reason for the update or enter **Skip** to continue without providing a reason.
8. Enter your suggested category.
   ServiceNow Otto analyzes your input and provides AI-generated suggestions.
9. Review the suggested options and select the one you want to apply.

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Result
The product category or spend category for the selected purchase line is successfully updated.

Email parser agent for Sourcing and Procurement Operations

The email parser agent for Sourcing and Procurement Operations processes inbound emails and creates the appropriate procurement cases without manual intervention.

Prerequisites

To enable the email parser agent in Sourcing and Procurement Operations, complete the following prerequisites:

- Install the Notifications Email Agents plugin (sn_notif_agents). For more information, see Activate Notifications Email Agents plugin.
- Enable the **Trigger Intent to Action** property on the Inbound Email Actions page. For more information, see Enable intent to action workflow from inbound actions.
- Enable the **Email receiving enabled** property for Inbound Email Configuration on the Email Properties page to receive emails. For more information, see Inbound email configuration.

Intent to action agentic workflow

When an email arrives in the configured SPO mailbox, the email parser agent triggers immediately and performs the following actions:

1. Receives the inbound email. The agent monitors a dedicated email address configured for the SPO instance.
2. Processes the email content. The agent reads the subject and body, then maps the content against predefined intent categories.
3. Determines the intent. The agent determines what kind of procurement action is being requested.
4. Creates the appropriate case. Depending on the intent, the agent creates one or more of the following:
   - A procurement case, for purchase order details, negotiation information, or other case-related requests.
   - A Universal Request, for supplier case inquiries.
5. Sends a confirmation email. The agent sends a notification to the requester for each case created, using existing SPO email templates. The notification includes a link to the relevant case in Employee Center.

A single email can contain multiple intents. For example, an email can contain a question about a negotiation and a question about a supplier case. The agent determines each intent independently, creates the corresponding cases, and sends a separate confirmation email for each.

SPO MCP Server

Use the SPO Model Context Protocol (MCP) Server to complete sourcing and procurement tasks in conversational interfaces such as Claude and Moveworks, without accessing the ServiceNow instance directly.

The SPO MCP Server connects procurement operations to the MCP client applications in your organization. Submit purchase requests, track request status, complete approvals, and receive notifications about your procurement activity without leaving your MCP client.

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Supported MCP clients

The SPO MCP Server supports any MCP-compatible client application, including:

- Claude (Claude.ai web and mobile)
- Moveworks

Key capabilities

The SPO MCP Server provides the following capabilities:

Conversational intake

Intelligent workflow that answers procurement questions, asks discovery questions to validate selections against KB articles and approval rules, then routes to pre-filled on-catalog or off-catalog request forms.

Status visibility

Requesters can search for and track their sourcing, procurement, and purchase order records, view details, related tasks, and comments, and add records to a watchlist.

Task completion

Users complete approval, sourcing, and acknowledgement tasks directly in chat. Tasks that require external interactions such as video calls or document signing, route to Employee Center.

SPO MCP Server users

SPO MCP Server users and responsibilities

Users	Responsibilities
Administrators	Configure the SPO MCP Server in your ServiceNow instance.
Employees and requesters	Submit purchase requests and track request status through an MCP client application without accessing the ServiceNow instance.

How the SPO MCP Server works

The SPO MCP Server operates as a secure intermediary between any MCP client application and the ServiceNow instance:

1. The SPO MCP Server user asks a question using an MCP client. For example, an employee or requester opens an MCP client such as Moveworks or Claude and asks a question about a procurement request.
2. The MCP client sends the question to the SPO MCP Server using the Model Context Protocol.
3. The SPO MCP Server authenticates the user against the ServiceNow role-based access control.
4. The SPO MCP Server retrieves the requested data or performs the requested action in the ServiceNow instance.
5. The SPO MCP Server returns the result to the MCP client, which displays the result to the user.

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Activate SPO MCP Server

Activate the SPO MCP Server to make sourcing and procurement tools available to connected MCP clients on your ServiceNow instance.

Before you begin

The following plugins must be activated on your instance:

- ServiceNow Otto for Sourcing and Procurement Operations (SPO) (sn_spend_gen_ai)
- Model Context Protocol Server (sn_mcp_server)

Role required: sn_mcp_server.admin or admin

Procedure

1. Navigate to **All** > **MCP Server Console**.
2. From the **Configuration** tab, select **Servers**.
3. Select **SPO MCP Server**.
4. Change the application scope to **SPO MCP Server**.
   The **SPO MCP Server Console** page opens with all fields populated by default.
5. From the **Deactivate** list, select **Activate**.
   All tools are available to connected MCP clients. For information about the available tools, see SPO MCP Server tools.
6. Set up OAuth to authenticate SPO MCP Server with your ServiceNow instance.

Authentication options

Authentication option	Steps
Use the SPO MCP Server OAuth client entry	**a.** Select **Set up OAuth**. **b.** Navigate to the **sn_spend_gen_ai.spo_mcp_server** client. The fields on the authorization code grant page are automatically populated. **c.** From the **Auth scope** list, select **a2aauthscope**. **d.** Select **Save**.
Set up your own OAuth connection	To set up your own OAuth client entry, the oauth_admin or admin role is required. For more information on how to set up your own OAuth connection, see Connecting to an MCP server from an MCP client.

Result

SPO MCP Server is activated and authenticated. Connected MCP clients can access all available sourcing and procurement tools.

SPO MCP Server tools

Tools available in the SPO MCP Server, their internal names, and what each tools does.

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SPO tools

Tool label	Tool name	Description
Describe Intake Requirements	sn_spend_gen_ai.spo_describe_intake_requirements	Returns the required intake fields and submission instructions for a selected product or catalog item. This tool applies after the user selects an item from `spo_search_catalog_offerings`. It collects the required information, then presents a prefilled submission link for the user to review and submit.
Initialize Procurement Session	sn_spend_gen_ai.spo_initialize_procurement_session	Returns the user's profile, relevant knowledge base articles, suppliers, and approval requirements at the start of a procurement conversation. When the user's opening question is provided, the tool returns relevant suggestions. Without it, the tool returns profile data only. `spo_search_catalog_offerings` is the next tool to use after the user's purchase intent is clear.
Query Procurement Records	sn_spend_gen_ai.spo_query_procurement_records	Finds and retrieves details on purchase requisitions, purchase orders, sourcing requests, and related tasks. Supports search by description or look up by record number.
Search Catalog Offerings	sn_spend_gen_ai.search_catalog_offerings	Finds supplier products and catalog intake forms matching the user's purchase intent. After the user selects an item, `spo_describe_intake_requirements` applies to that selection.
SPO Execute Procurement Task Action	sn_spend_gen_ai.spo_execute_procurement_task_action	Acts on procurement tasks such as approving, rejecting, or confirming receipt. Explicit user confirmation is required before the action proceeds.

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Request a procurement item using SPO MCP Server

Submit a procurement request for catalog and off-catalog items through an MCP client connected to SPO MCP Server in ServiceNow Otto for Sourcing and Procurement Operations (SPO). The MCP client guides you through discovery questions, displays product recommendations, and routes you to Shopping Hub or Employee Center to complete your request.

Before you begin

Before you begin, confirm the following:

- SPO MCP Server must be activated and connected to your MCP client.
- You must have access to an MCP client such as Claude.

Role required: sn_spend_gen_ai.now_assist_requester

About this task

Use conversational intake to streamline procurement requests. You can ask procurement questions and submit purchase requests without leaving the MCP client chat. Conversational intake:

- Handles how-to and knowledge base (KB) article questions about procurement processes.
- Routes non-purchasing requests to create a procurement request (PR) or service catalog request (SR).
- Presents discovery questions to identify the supplier and amount needed for purchase requests.
- Validates selections against knowledge base articles and approval rules.
- Routes you to pre-filled on-catalog or off-catalog request forms.

Procedure

1. Open your MCP client, such as Claude, that is connected to your ServiceNow instance using the SPO MCP Server.
   For more information on how to configure SPO MCP Server, see Activate SPO MCP Server.
2. Enter your procurement request into the chat.
   For example, enter `I want to purchase a tripod from ServiceNow`.
   The Initialize Procurement Session tool retrieves your user profile information, policies, approval rules, and product categories relevant to your request.
3. Answer the discovery questions that appear in the chat.

   Discovery questions may include:

   - What is the quantity you need?
   - What is the purchase reason?
   - What is your budget?
   - Any other details specific to your request, such as monitor size, specifications, or preferred date.

   Respond conversationally or select from the options provided.

   The Search Catalog Offerings tool processes your answers and displays product recommendations based on your requirements.
4. Review the product recommendations displayed in the chat.

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Each recommendation includes a description of why it matches your requirements.

5. Select a product from the recommendations.

   You can type the number corresponding to your choice. For example, `1` for the first item, or describe which product you prefer.

   The Describe Intake Requirements tool generates a pre-filled link to either Shopping Hub (for catalog items) or Employee Center (for off-catalog items).

6. Select the generated link to open Shopping Hub or Employee Center.

   The link pre-fills details that you provided in the chat, such as quantity, purchase reason, and product category.

   Shopping Hub or Employee Center opens with your procurement form partially completed.

7. Complete any remaining required fields in Shopping Hub or Employee Center.

   Review all fields on the form. Fill in any information that was not automatically populated, such as:

   - Request details
   - Additional comments or specifications
   - Any fields marked as required by your organization

8. Select **Submit** to submit your request.

   Your request is submitted to your organization's procurement queue.

Result

Your procurement request is submitted. You can track the request status in Employee Center or through your organization's procurement system.

Complete procurement tasks using SPO MCP Server

View the status of your procurement tasks and complete approval, sourcing, and receipt tasks in your MCP client connect to SPO MCP Server. For tasks that require external interactions, such as signing a document or watching a video, the SPO MCP Server routes you to the Employee Center.

Before you begin

Before you begin, confirm the following:

- SPO MCP Server must be activated and connected to your MCP client.
- You must have access to an MCP client such as Claude.

Role required: sn_spend_genai_requester

About this task

Manage procurement tasks directly in your MCP client without switching between multiple systems. You can view all tasks assigned to you based on your instance access control lists (ACLs). Some tasks, such as e-signature or document uploads, require you to navigate to Employee Center. Others, such as recording receipts and approvals, can be completed entirely in your MCP client.

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Task types and completion locations

Task type	Completable in MCP client	Action
Receipt	Yes	Enter full or partial received quantities for line items.
Approval	Yes	Approve or request cancellation or more information.
E-signature	No	Navigate to Employee Center to sign documents.
DocuSign	No	Navigate to Employee Center to upload and sign documents.
Off-catalog request	No	Navigate to Employee Center to submit the request.

Procedure

1. Open your MCP client, such as Claude, that is connected to your ServiceNow instance using the SPO MCP Server.
   For more information on how to configure SPO MCP Server, see Activate SPO MCP Server.
2. In your MCP client, enter a prompt to view your assigned tasks.
   For example, enter `What are my procurement tasks`.
   Your MCP client displays all tasks assigned to you based on your user role and ACL permissions. Each task shows the task type, associated action, creation date, and current status.
3. Select a task to complete.
   You can either select a task from the list or provide a specific task number if you already know which task you want to work on.
4. Complete the task action.

   Different task types require different actions:

   - For receipt tasks, enter the received quantities for one or more line items. You can select a full receipt or specify partial quantities. For example, if you ordered 20 items and received 3 today, you can specify the partial receipt of 3 units.
   - For approval tasks, review the request details and approve or request cancellation or additional information.
   - For other tasks, follow the prompts for your specific task type.

   After you enter your action, such as a quantity or an approval decision, the task status updates in your MCP client.
5. For tasks requiring Employee Center, select the generated link to navigate to Employee Center to complete the action.

   Your MCP client supports the completion of receipt, approval, and sourcing tasks. For tasks such as e-signature, document uploads (DocuSign), or off-catalog requests, your MCP client provides a direct link to Employee Center. Select the link to navigate to Employee Center and complete the required action there, then return to your MCP client to continue managing additional tasks.

Result

Your task is completed. If the task was completable in your MCP client, ServiceNow Otto for SPO updates the task status immediately. If the task required actions in Employee Center, the task is updated after you complete those actions. You can now select another task from your list to continue managing your procurement workflow in your MCP client.

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Exploring Sourcing and Procurement Operations

Learn about the benefits and capabilities of Sourcing and Procurement Operations (SPO).

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Sourcing and Procurement Operations overview

Sourcing and Procurement Operations provides employees with a simple, automated, AI-assisted tool to request goods and services they need at work. It delivers an end-to-end procurement experience, from shopping and sourcing to purchase order creation, receipt, and invoicing, while providing procurement specialists with a centralized workspace to manage and automate purchasing activities.

Sourcing and Procurement Operations users

Users

User	Description
Shopper	Shopper browses the product catalog in Shopping Hub, submits purchase requests, tracks order status, and confirms receipt of delivered goods from Employee Center.
Procurement Specialist	Procurement Specialist reviews and manages sourcing requests, purchase requisitions, and negotiations in Source-to-Pay Workspace. The specialist can also create and resolve procurement cases and convert requisitions into purchase orders.
Procurement Administrator	Procurement Administrator manages primary data and administration settings in the Sourcing and Purchasing Automation module, including approval rules, assignment rules, and purchasing properties.

Sourcing and Procurement Operations workflow

A workflow for sourcing and procurement operations might progress as follows:

1. The requester (employee or shopper) browses the product catalog in Shopping Hub and submits a purchase request, either selecting a cataloged item through quick checkout or raising an off-catalog request for goods and services not listed.
2. The system evaluates the request and automatically routes it—creating a sourcing request if the item has no contractual pricing, or a purchase requisition if pricing already exists—and assigns it to the appropriate procurement specialist based on purchasing assignment rules.
3. The procurement specialist reviews the request in Source-to-Pay Workspace and, if required, initiates qualification activities such as supplier risk assessment, supplier onboarding, or contract review before proceeding.
4. The procurement specialist conducts negotiations with one or more suppliers, collects quotes, and awards the sourcing request to the winning supplier, establishing the negotiated price on the purchase line.

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5. The system triggers the approval workflow, routing the purchase requisition to the relevant approvers based on configured approval rules. Approvers can approve, reject, or request clarification directly from Employee Center or via email notification.
6. Once all approvals are obtained and any associated tasks and cases are resolved, the system generates a purchase order, which is transmitted to the awarded supplier.
7. The supplier fulfills the order and ships the goods. The shopper can track shipment details in Shopping Hub. Upon delivery, the shopper confirms receipt of the ordered items from Employee Center, specifying the quantity received and the date of receipt.
8. The invoice from the supplier is matched against the purchase order and receipt, and upon successful matching and confirmation, the invoice is processed for payment.
9. Throughout the process, the requester can track the real-time status and progress of their purchase, including approvals, tasks, and delivery milestones, directly from Shopping Hub's My Purchases view.

Sourcing and Procurement Operations benefits

Sourcing and Procurement Operations benefits

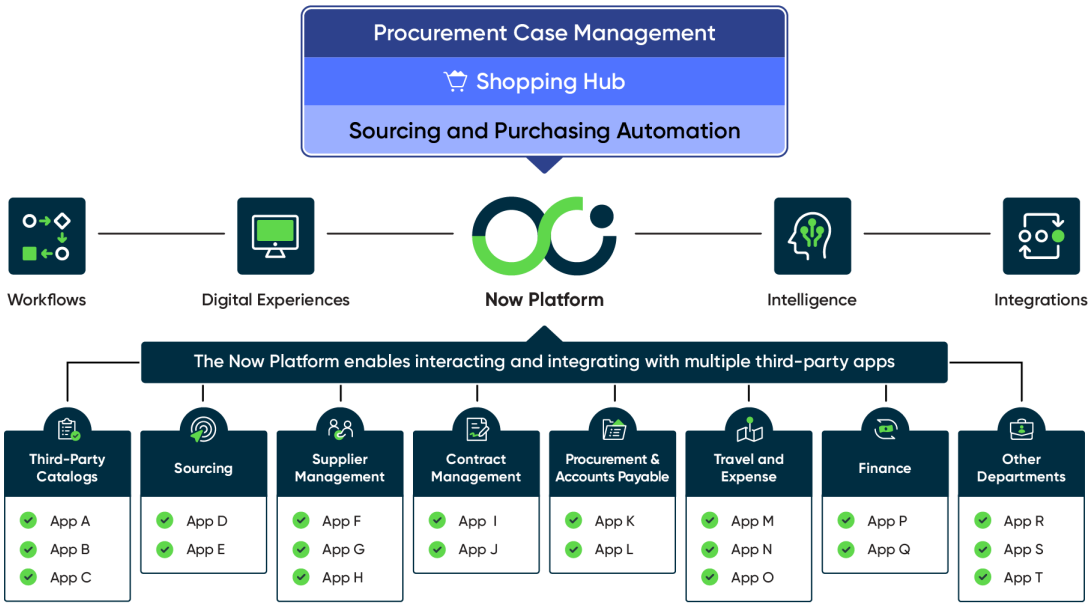
Benefit	Feature	Users
Browse a managed product catalog and submit purchase requests through a streamlined, e-commerce-like shopping experience.	Using Shopping Hub	Shoppers
Track the complete status and progress of purchases, including approvals, tasks, and delivery milestones, from a single view.	My purchases on Shopping Hub	Shoppers
Submit purchase requests using AI-assisted conversational intake, without relying on procurement fulfillers.	ServiceNow Otto for Sourcing and Procurement Operations (SPO)	Shoppers
Manage sourcing requests, purchase requisitions, negotiations, and procurement cases from a centralized workspace.	Source-to-Pay Workspace	Procurement specialists
Automate end-to-end sourcing and purchasing workflows, including approvals, task generation, and purchase order creation.	Sourcing and Purchasing Automation	Procurement specialists
Enable employees to raise procurement cases and allow procurement teams to manage and monitor fulfillment tasks.	Procurement Case Management	Procurement specialists, Shoppers
Assess spend, operational efficiency, and team performance using pre-configured dashboards and metrics.	Performance Analytics for Sourcing and Procurement Operations	Procurement specialists, Procurement administrators

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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 https://www.servicenow.com/docs/access?context=sourcing-procurement-operations-rn-static&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SPO Implementation Essentials and more, from ServiceNow University.

Best Practices

Explore the Best Practices content library to access resources and proven guidance that help accelerate the implementation and deployment of Sourcing and Procurement Operations features at Best Practices.

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.

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What to explore next

To learn more about configuring and using Sourcing and Procurement Operations, see:

- Configuring Sourcing and Procurement Operations
- Using Sourcing and Procurement Operations
- Sourcing and Procurement Operations reference

Shopping Hub

Shopping Hub (sn_spend_uib) is a self-service procurement portal that employees use to purchase products and services. It supports browsing internal catalog items and supplier catalogs, submitting purchase requests, and tracking orders from checkout through fulfillment.

Shopping Hub is part of the Sourcing and Procurement Operations (SPO) application and runs on the Next Experience UI Framework.

Key capabilities

The following table describes the primary capability areas available in Shopping Hub.

Capability	Description
Product discovery	Browse supplier catalogs by category or by supplier. Search using full-text queries. Access recently viewed products and role-based product suggestions.
Shopping cart	Add individual products or bundles to a cart, adjust quantities, save carts for later, and review cart contents before checkout.
Checkout	Select delivery location, delivery date, shipping method, payment method, cost center, and purchase reason during the checkout process. An express checkout path is available for faster submission.
Purchase management	View purchase history across purchase orders and requisitions. Track order status, request purchase modifications, and reorder from previous purchases using the Buy Again option.
Task and approval management	Complete workflow tasks from the My Tasks view, including approvals, supplier selection, receipt confirmation, service acknowledgment, document upload, milestone confirmation, and post-purchase clarifications.
Sourcing requests	View supplier quotes for a sourcing request, compare pricing across multiple suppliers, and select a supplier to fulfill the request.
Punchout integration	Access external supplier catalogs through punchout connections using the cXML protocol. Products from punchout catalogs follow a separate detail and checkout flow.
Credits	Apply available procurement or corporate credits toward purchases at checkout.
Multi-currency display	View product pricing in both the supplier currency and the local currency.
On-behalf purchasing	Submit purchases on behalf of other employees when you have the required permissions. Permission controls restrict this capability to authorized users.

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Shopper workflow

A typical purchase in Shopping Hub begins with product discovery. You can browse the catalog by category or by supplier, or enter search terms to locate a specific product or service. Selecting a product opens its detail page, where pricing, availability, supplier information, and product attributes are available for review.

After adding products to the cart, you proceed to checkout to specify delivery details, a payment method, and a cost center. The full checkout flow supports per-product delivery date and location customization. After submitting the purchase, the portal creates a purchase order or requisition depending on the procurement configuration.

You monitor purchase status in **My Purchases**. If the procurement workflow generates tasks, such as approval actions, receipt confirmations, or supplier selections, those tasks appear in **My Tasks** for you to complete. For frequently purchased items, the **Buy Again** option in **My Purchases** shortens the process by pre-populating cart and checkout details from a previous order.

Roles and access

Access to Shopping Hub is controlled by the following predefined roles.

Role	Description
`sn_shop.shopper`	Can browse catalogs, manage carts, check out, track purchases, and complete workflow tasks.
`sn_shop.shopping_hub_admin`	Can configure and manage Shopping Hub settings.

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.

Important: Check your entitlements to determine whether you have access to Shopping Hub.

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
- Setting up primary data for ShoppingHub
- Service portal configuration for ShoppingHub
- Configure punchout for third-party site purchases
- Customize your top suppliers on Shopping Hub
- Using Shopping Hub

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Process visibility

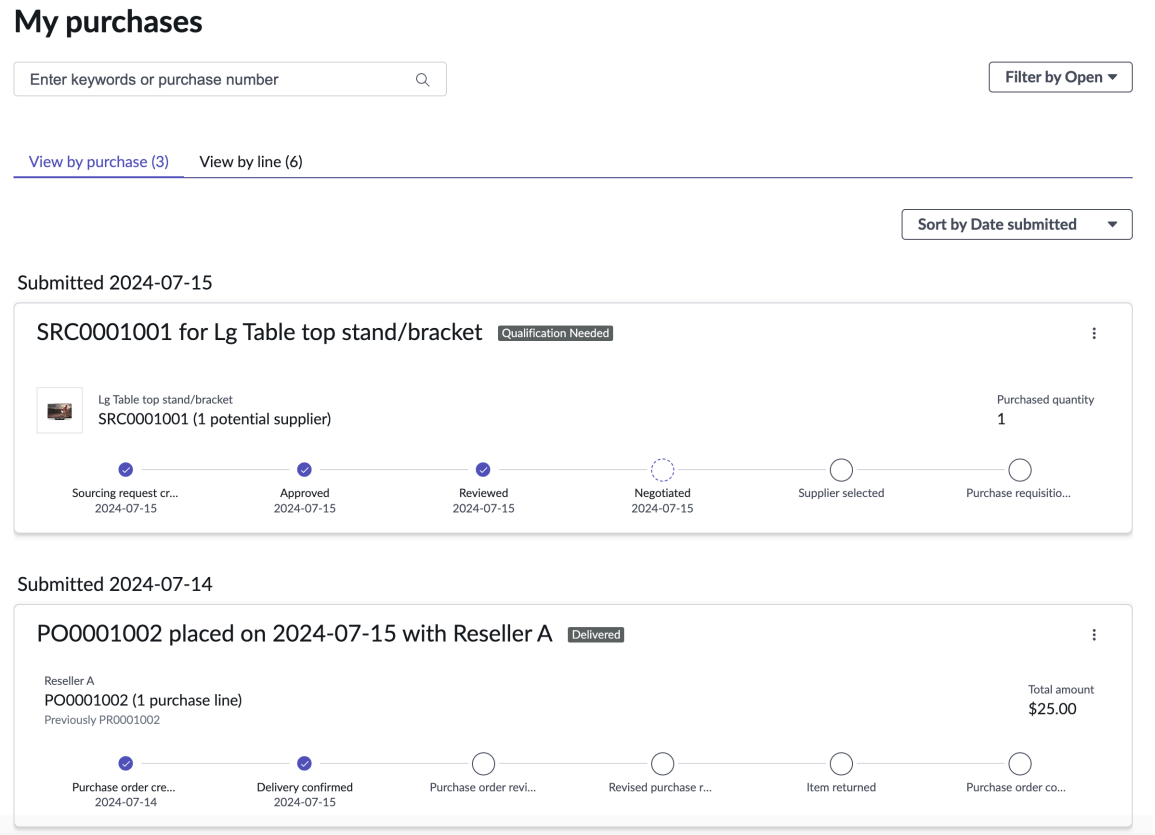
You can track the complete procurement process post request submission. The process steps and work items can be configured to meet your business requirements.

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.

My purchases list view

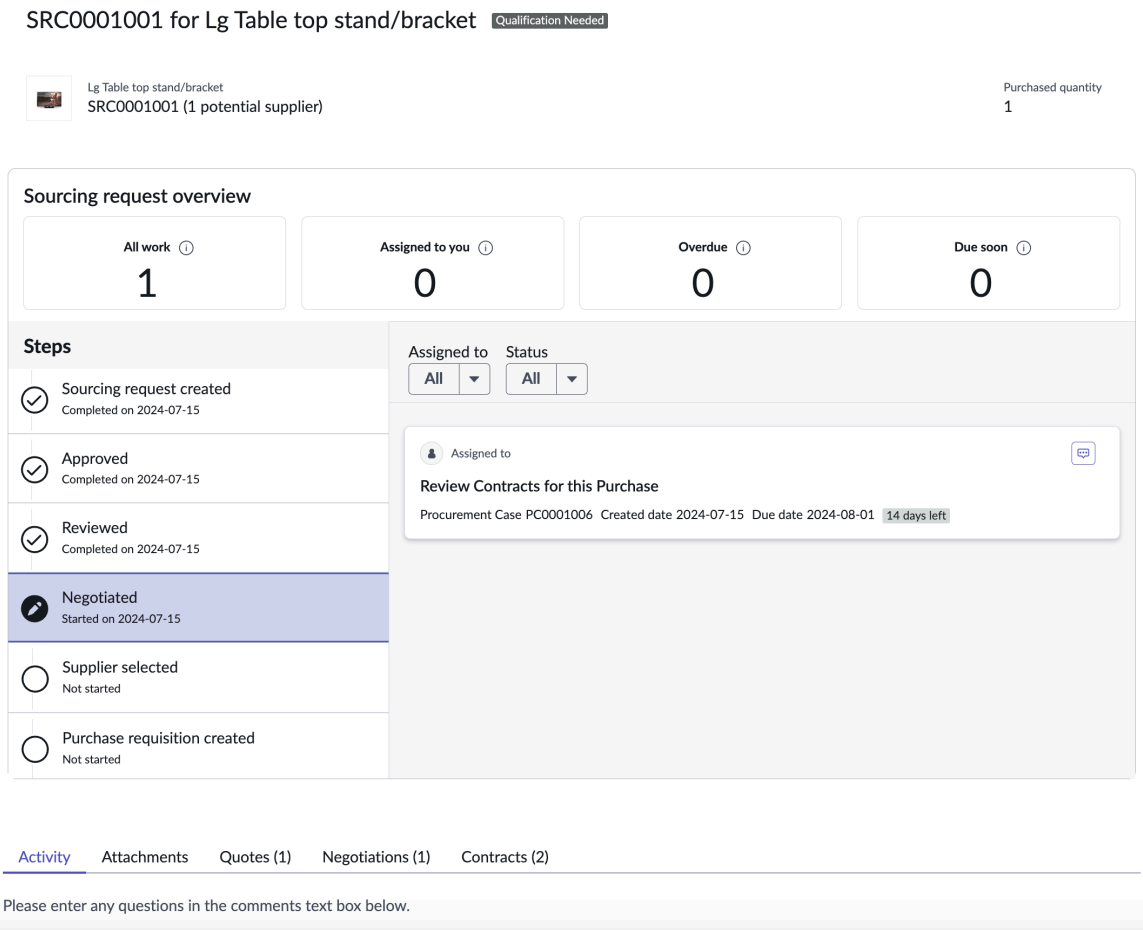
You can view the list of all the purchases made from your shopping account by selecting My purchases from your Shopping Hub profile.



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.

Related topics

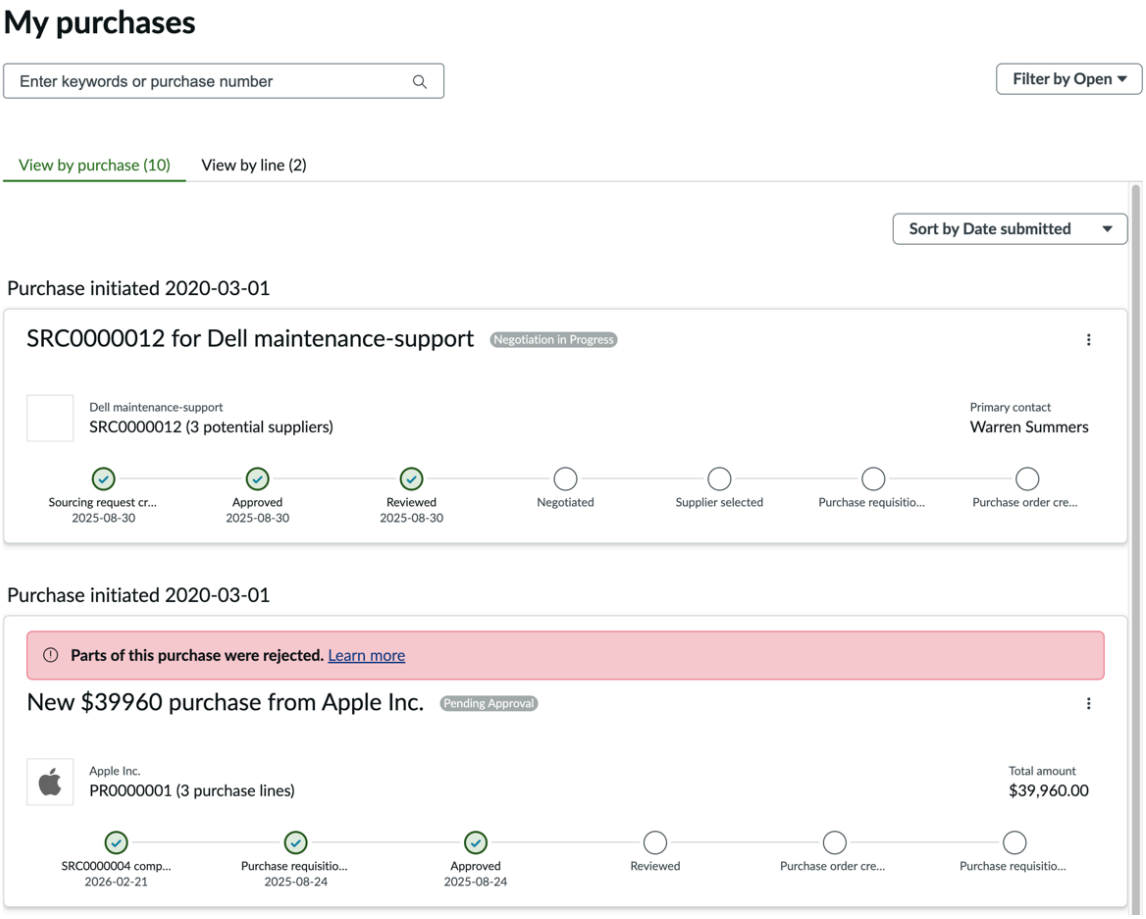
Shopper to-dos

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Purchase state indicators

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.

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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 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**

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

My to-dos and purchasing to-dos

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

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

On the **Purchasing to-dos** tab, however, you can only view the non-shopper responsible purchasing to-dos that are associated 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.

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Multi-currency support in Shopping Hub

Shoppers can view and select their local currency during shopping in Shopping Hub, providing a seamless multi-currency experience.

Key benefits

The multi-currency functionality provides the following benefits:

- Enables shoppers to view prices in their familiar local currency, helping them make more informed purchasing decisions.
- Enables shoppers operating across multiple geographies to toggle between currencies, providing better context for purchase decisions.
- Enables approvers to view product prices in their local currency alongside the original supplier currency across email notifications and To-dos.

How to configure

Role required: sn_shop.procurement_administrator

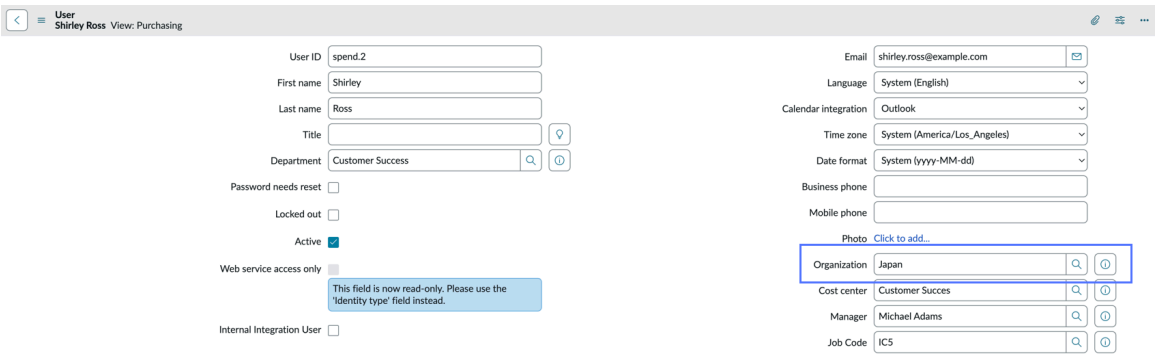
Plugin required: Shopping Hub (sn_spend_uib)

Ensure that you complete the following configurations for the multi-currency functionality to work correctly in Shopping Hub.

- Set the `sn_spend_uib.local_currency.enable.menuoption` system property to enable shoppers to view product prices in local currency in Shopping Hub. For more information, see Components installed with Sourcing and Procurement Operations.

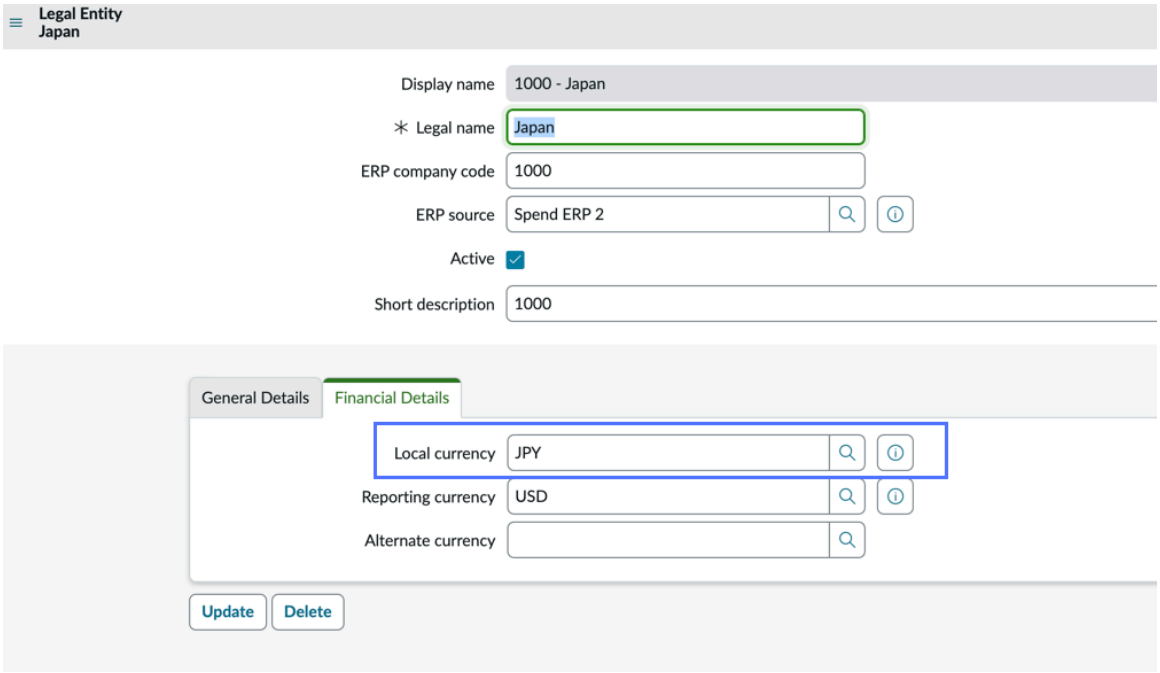
  Note: Property is set to True by default. If you do not want prices to be displayed in the local currency, set this property to False.

- Ensure that each sys_user record is associated with an organization.



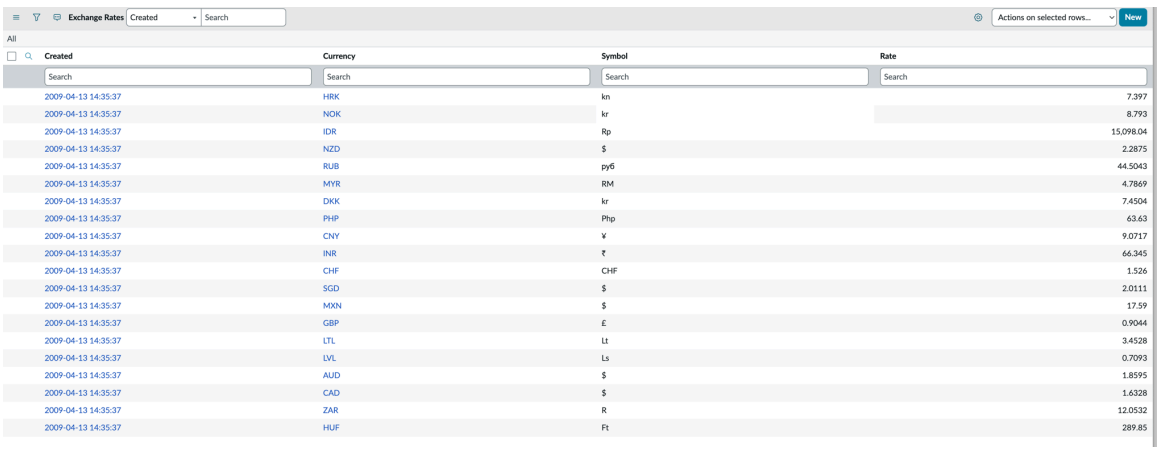
This allows the organization's local currency to become the user's default currency upon login.

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Note: This is the Legal Entity record. On this record, you can view the local currency associated with the legal entity.

- To display a currency in the **View prices in** drop-down list on the Shopping Hub home page, a corresponding Currency record must exist in the fx_rate table and be active.

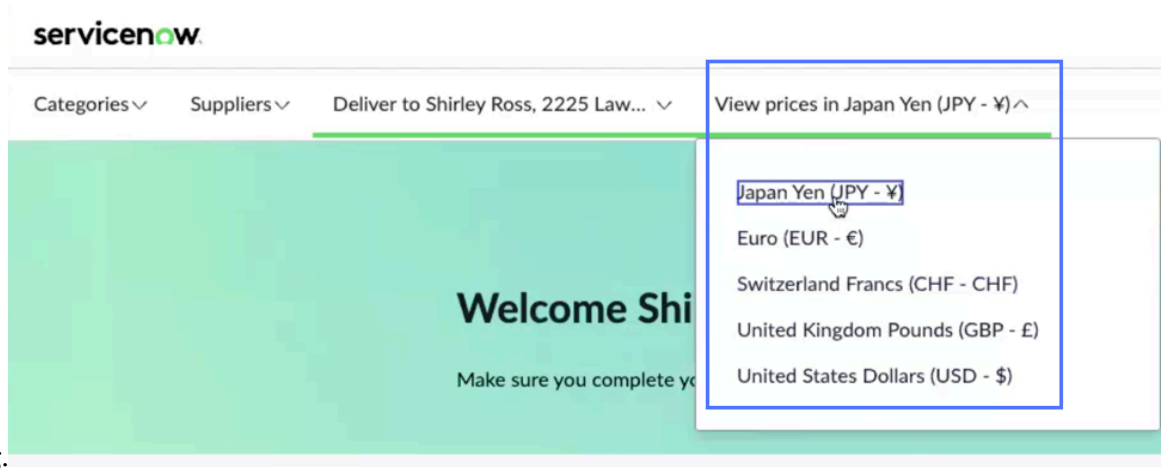


How it works

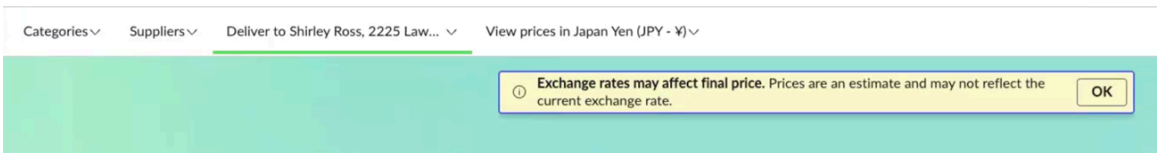
The following points describe how the multi-currency feature works:

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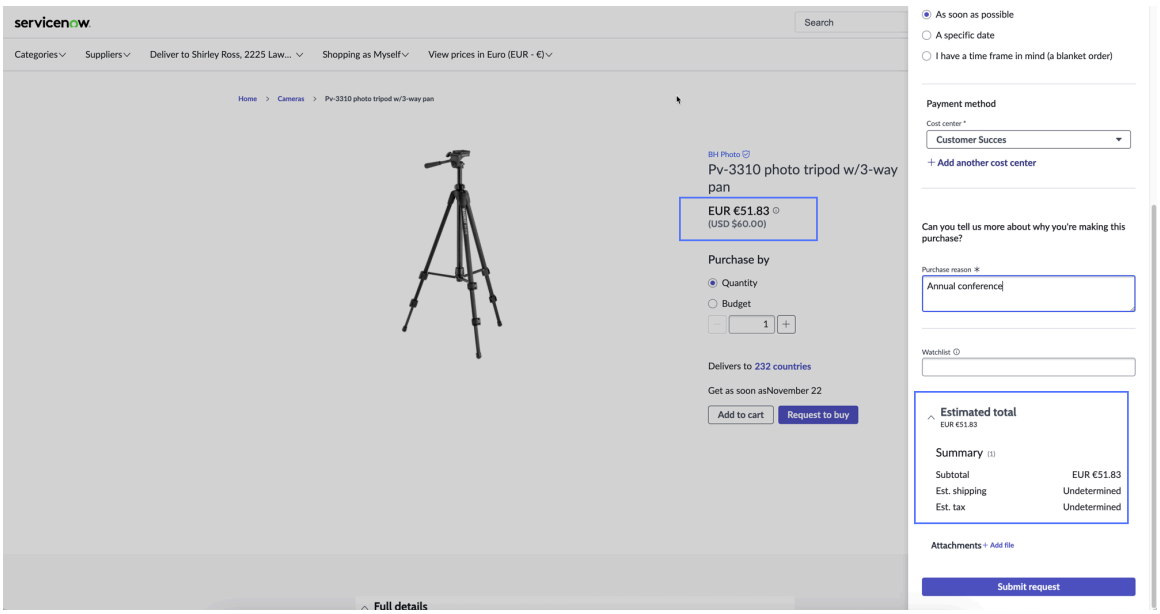
- Shoppers can select the currency they want to view during shopping.



When a shopper selects a currency, the following banner message appears.



- For delegated shopping, the default currency is derived from the delegator's legal entity.
- Estimated prices are displayed consistently across supplier cards, product details, cart, checkout, and purchase tracking pages.



- As an approver, you can view the product price in your local currency alongside the original supplier currency. This information appears in email notifications and To-dos in Employee Center and Shopping Hub.
- The product price is also displayed in both your local currency and the original supplier currency on the product bundle page.

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Purchase requisition line-level questions in Shopping Hub

Line-level questions let procurement admins capture product-specific information during checkout, improving data accuracy and enabling flexible purchase requisition workflows.

Key benefits

Capture essential information during request intake to minimize back-and-forth communication between the requester, fulfiller, and supplier.

How to configure

Role required: sn_shop.procurement_administrator

Plugin required: Shopping Hub (sn_spend_uib)

For more information about creating configurable, line-level questions for shoppers, see Configure line-level questions in ShoppingHub.

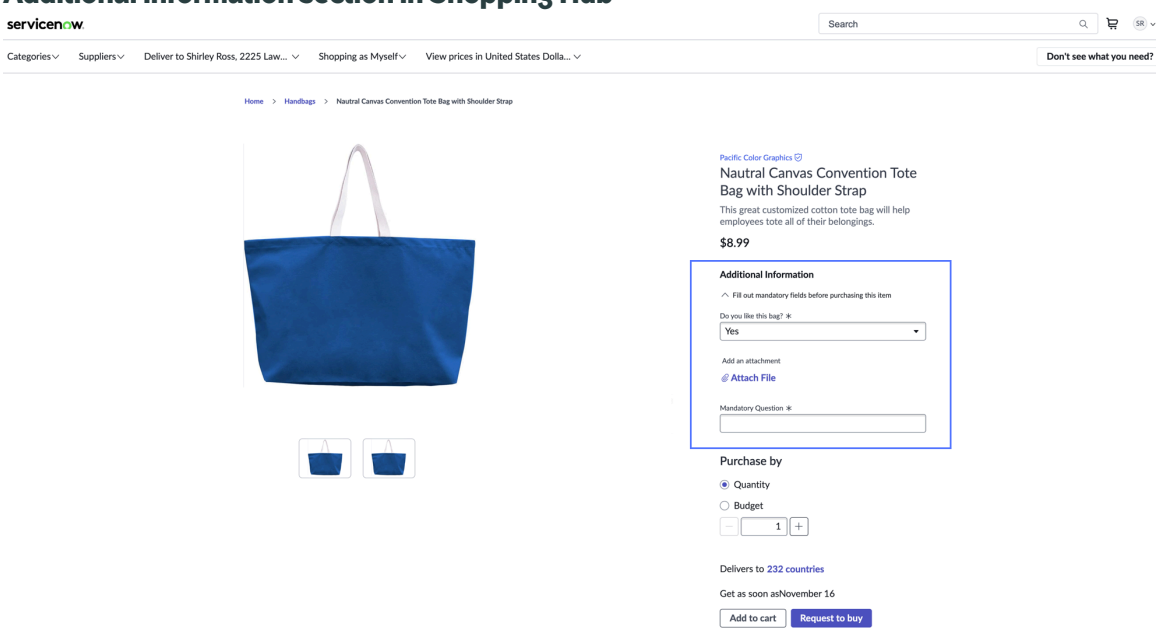
How it works

Learn how shoppers can access and enter additional product information at the line level when creating or reviewing purchase requisitions.

The additional information or questions added in the record producer for a specific product, product model, or product category appear during checkout in Shopping Hub.

If the questions are configured as mandatory, selecting**Add to cart** or **Request to buy** expands the Additional information section, where you must provide your responses. You can submit the purchase only after answering all mandatory purchase requisition line-level questions for the selected product.

Additional Information section in Shopping Hub

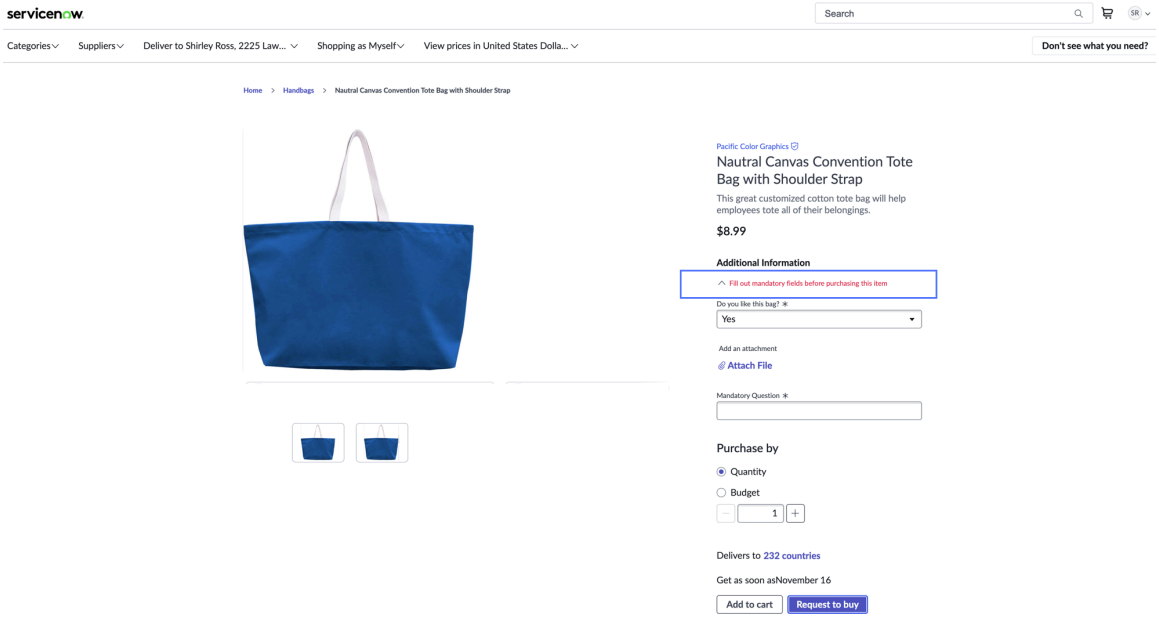


Note: Edits to additional questions require shoppers to create a case for a fulfiller to update the responses. Shoppers can also request updates by posting a message in the purchase's activity stream.

If you select **Add to cart** or **Request to buy** without completing mandatory fields in the Additional Information section, a message prompts you to fill them first.

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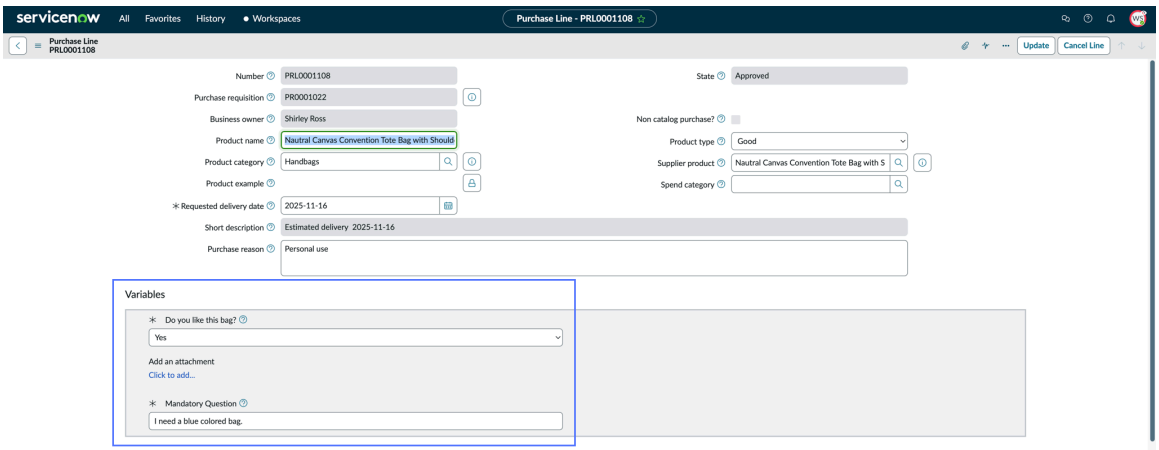
Fill mandatory fields message in Additional Information section



After a purchase requisition is created for your request, the fulfiller can view the additional information in the Variables section of the purchase requisition line record in the ServiceNow AI Platform.

Note: The **Variables** input field is not available by default in the Outbound Order [sn_spend_intg_outbound_purchase_order] staging table. To integrate with an ERP system, you must add the **Variables** field.

Variables section of a PRL record in ServiceNow AI Platform

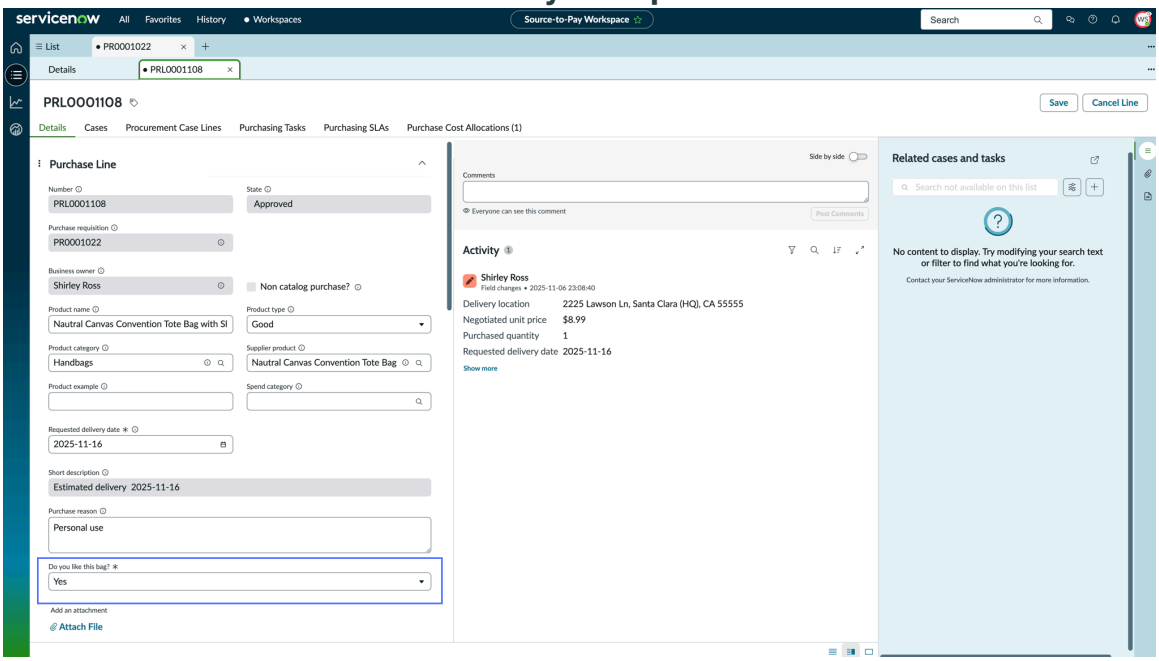


Additionally, the fulfiller can view this information on the **Details** tab of the purchase requisition line record in the Source-to-Pay Workspace.

Note: Fulfillers can update the response in the Variables section on the PRL record. The fulfiller can modify responses until the POL moves to the Ordered state. When the POL is in Revision state, the Variables section becomes editable again.

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Details tab of a PRL record in Source-to-Pay Workspace

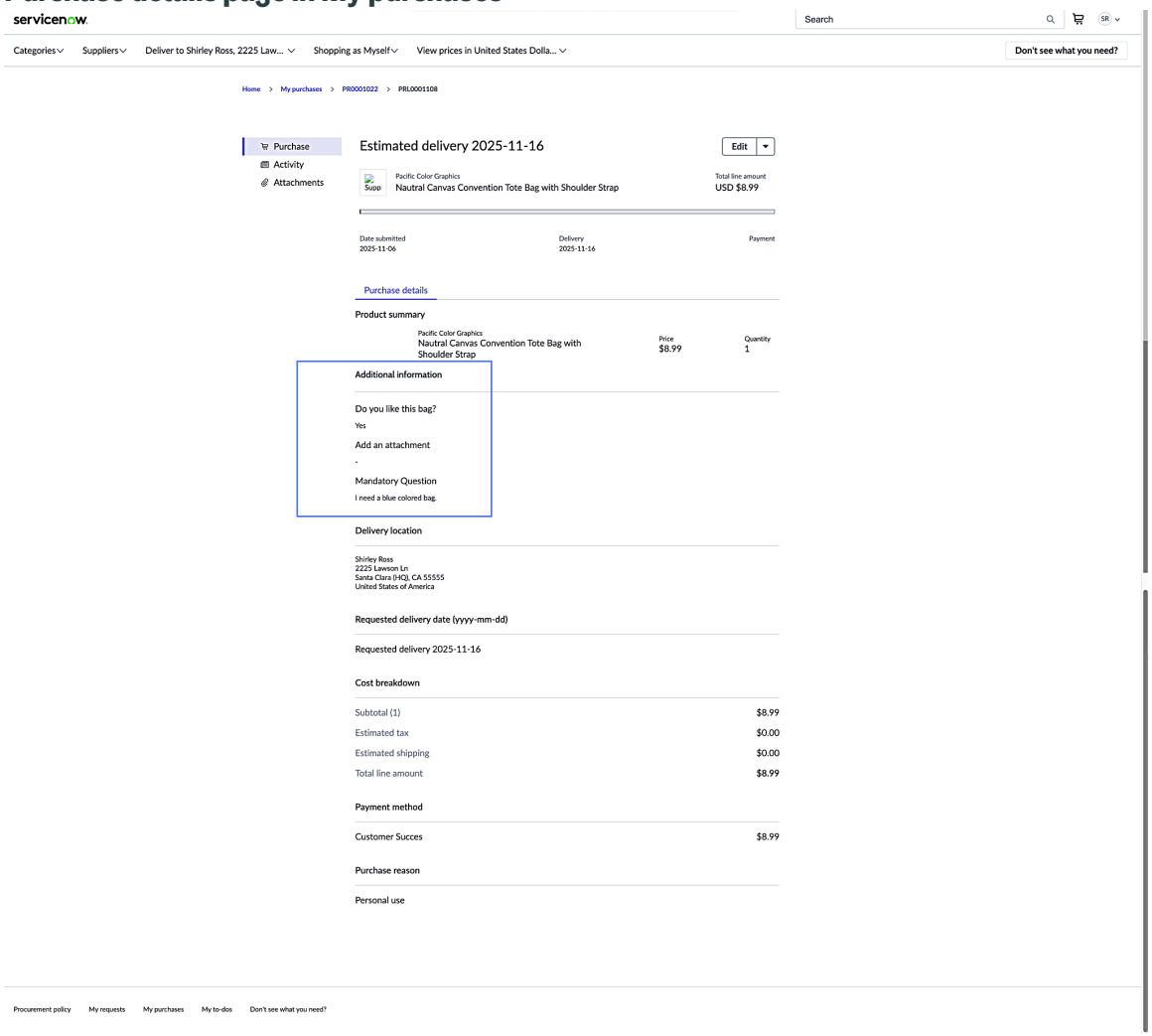


Note: Fulfillers can update the response in the Variables section on the PRL record's **Details** tab in the Source-to-Pay Workspace. The fulfiller can modify responses until the POL moves to the Ordered state. When the POL is in Revision state, the Variables section becomes editable again.

The additional information also appears on the Purchase details page under My purchases in Shopping Hub.

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Purchase details page in My purchases



Purchase on behalf of another user in Shopping Hub

Shoppers can purchase products and services on behalf of another user in Shopping Hub. When purchasing on behalf of another user, shoppers can also view the carts and purchases associated with that user. A shopper who is authorized to purchase on behalf of other users is referred to as a super shopper.

Key benefits

This functionality provides the following benefits:

- Shopping controls allow administrators to define purchasing eligibility, ensuring that restricted products can't be purchased.
- Checkout is allowed only if the product can be shipped to the delivery location of the user on whose behalf the purchase is made. If shipping is not supported, Shopping Hub prevents the purchase from being submitted.
- Shoppers purchasing on behalf of other users can easily view those users' carts and purchases by selecting the user name from the filter list.

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System properties for purchasing on behalf of another user

System property	Description
sn_shop.skip_shopping_controls_for_purchase_on_behalf_of_users	Controls how Shopping Hub enforces shopping control restrictions when a super shopper purchases on behalf of another user. • Default value: false • When set to false, shopping control restrictions for the selected user are enforced and restricted products can't be purchased. • When set to true, restricted products for the selected user display a warning, but the purchase on behalf of another user is allowed to proceed.
sn_shop.skip_delivery_restrictions_for_purchase_on_behalf_of_users	Controls how Shopping Hub enforces delivery address restrictions when a super shopper purchases on behalf of another user and the product can't be delivered to the selected user's default delivery address. • Default value: false • When set to false, products that can't be delivered to the selected user's delivery address can't be purchased. • When set to true, a warning is displayed for non-deliverable products, and the super shopper is allowed to proceed with the purchase.

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System property	Description
sn_spend_uib.purchased_bahealf.enable.card.actions	Controls the availability of purchase card actions for purchases made on behalf of other users in My purchases. • Default value: true • When set to true, all supported card options are available for purchases made on behalf of other users. • When set to false, only the **View purchase** option is available.

How to configure

Role required: sn_shop.shopping_hub_admin

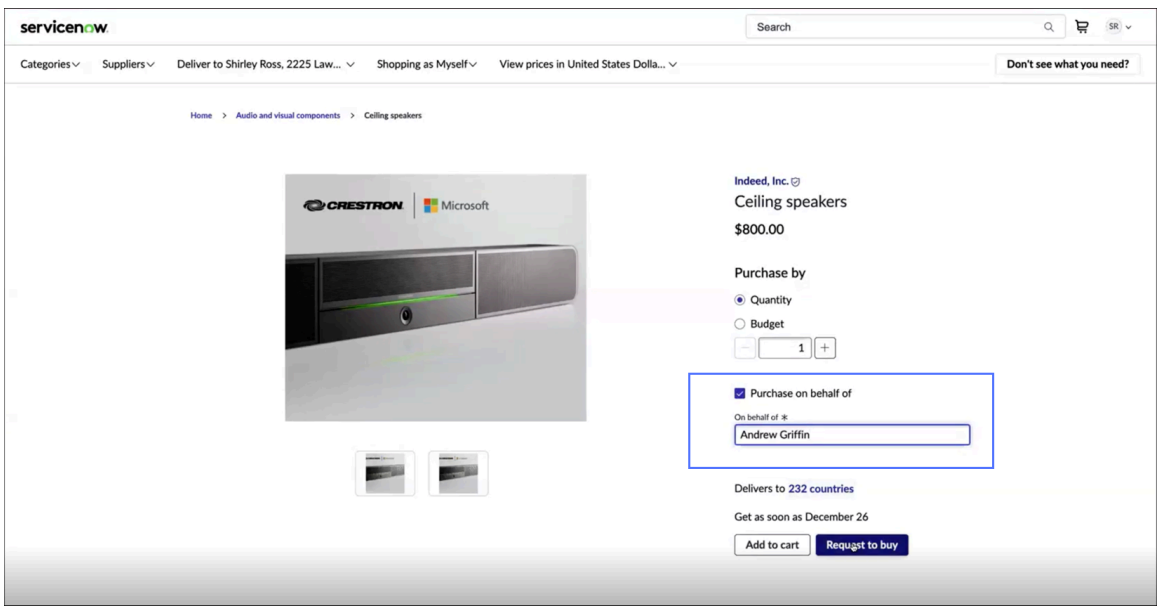
Plugin required: Shopping Hub (sn_spend_uib)

verify that you configure the super shopper to purchase on behalf of other users. For more information, see Enable a shopper to purchase on behalf of another user.

How it works

The following points describe how this capability works:

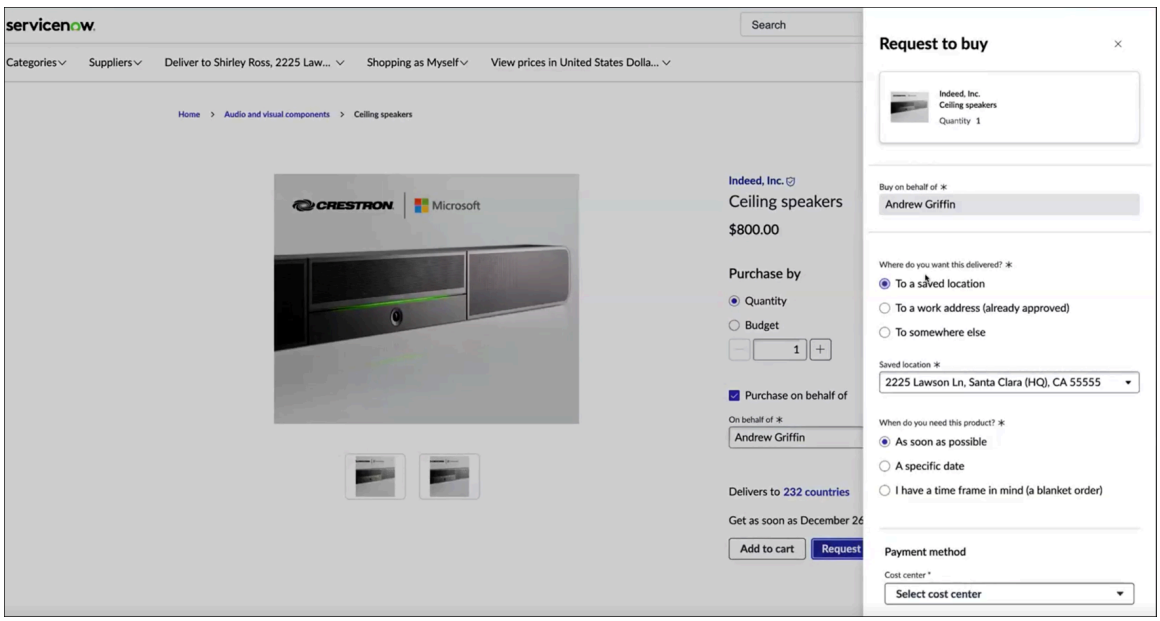
To make a purchase on behalf of another user, select a product and then select the **Purchase on behalf of** check box. From the **On behalf of** list, select the user for whom the purchase is being made (for example, Andrew Griffin).



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Important: If a shopper selects another product immediately after completing a purchase on behalf of a user, the **On behalf of** list automatically defaults to that same user, so the shopper does not need to reselect them for consecutive purchases. This default no longer applies after the shopper clears the **On behalf of** selection, and it resets when a new session begins.

After **Request to buy** is selected, the system displays the relevant details configured for the selected user, such as cost center and delivery location. These details can be modified before the request is submitted.



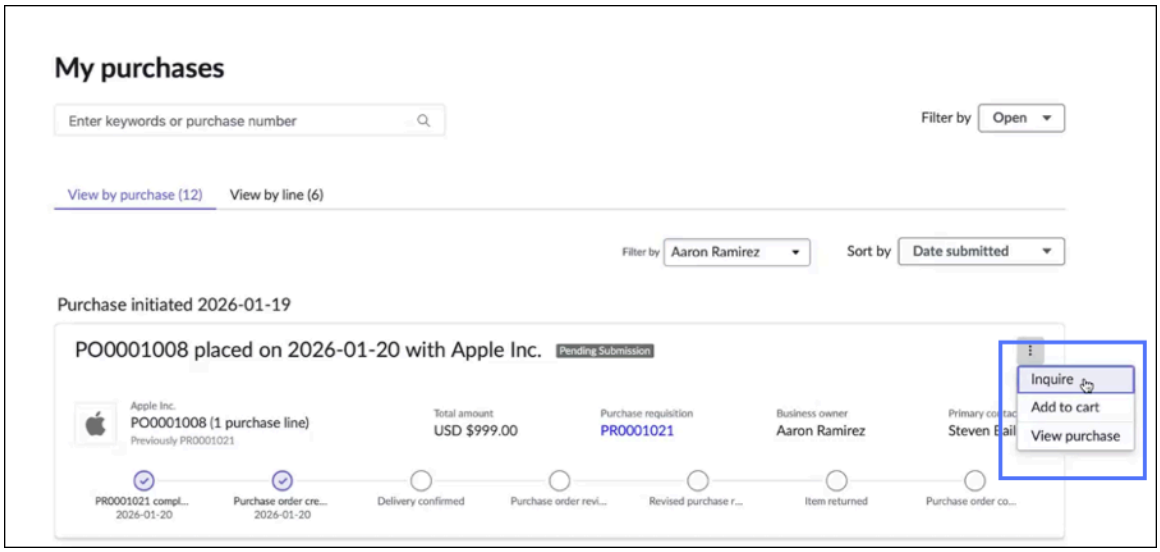
After the request is submitted, the purchase is available in My purchases. By default, the page displays purchases made by you. You can use the filter to view purchases made on behalf of other users.

Tasks aren't automatically assigned to the person the item was purchased for. To verify they can confirm receipt of the item, make sure the selected address includes the business owner's name in the **Recipient** field. For all other tasks, the procurement specialist can reassign ownership to the business owner.

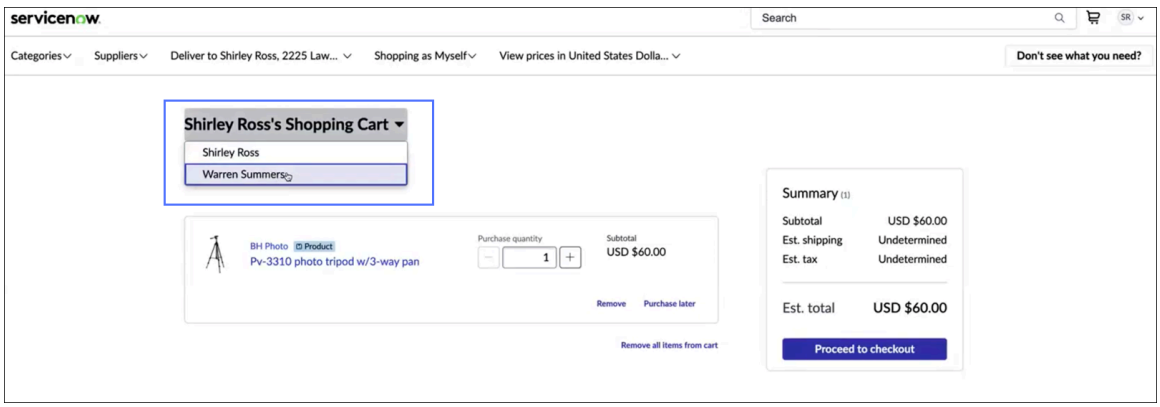


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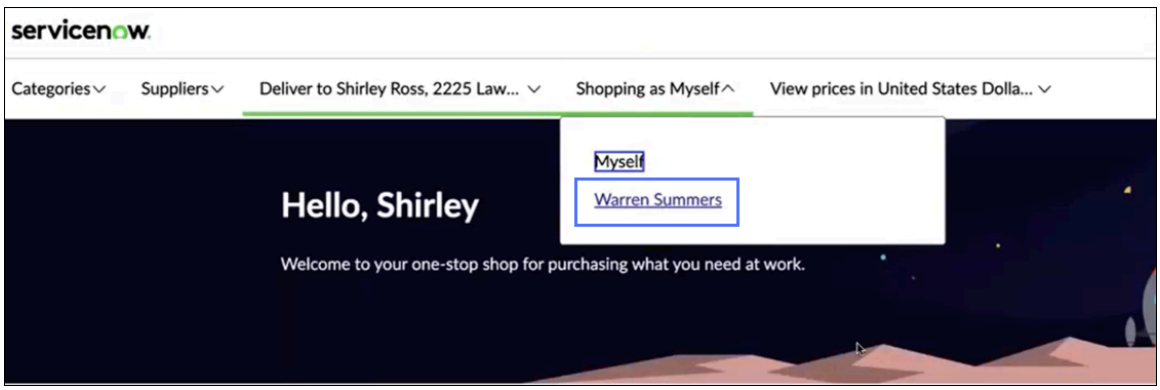
If the **sn_spend_uib.purchased_bahealf.enable.card.actions** system property is set to true, all available card options are displayed for purchases made on behalf of other users. If the property is set to false, only the View purchase option is available.



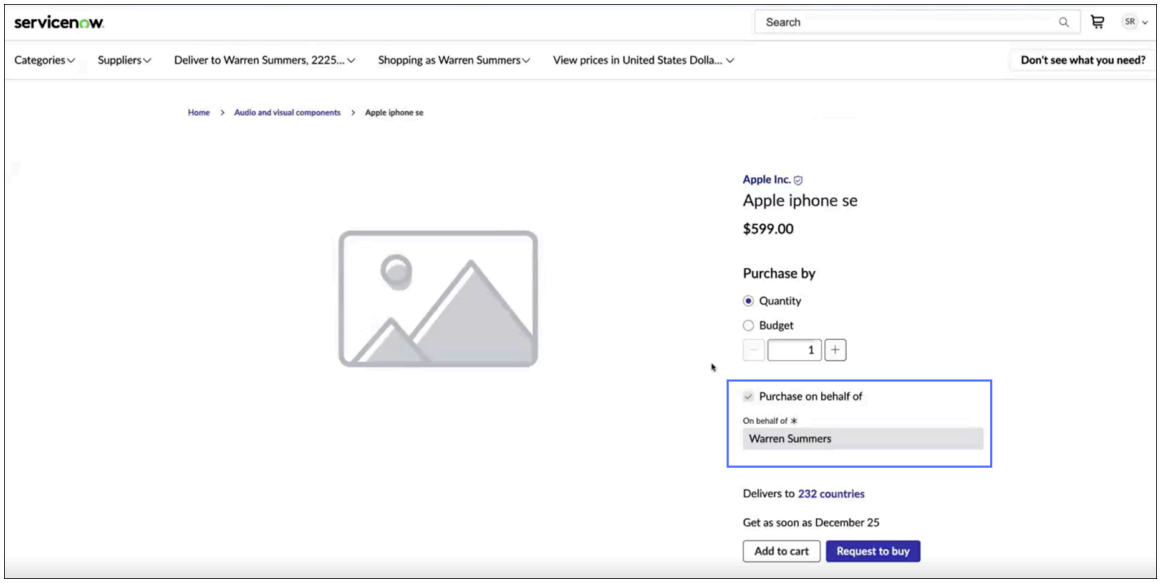
You can also view the carts of users on whose behalf you're making purchases.



If a user is selected from the **Shopping for** list (for example, Warren Summers), the **Purchase on behalf of** check box is inactive. In this case, Shopping Hub automatically sets the purchasing capability to the selected user only.



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Purchase punchout items on behalf of another user in Shopping Hub

Shoppers can purchase Level 1 (L1) and Level 2 (L2) punchout items on behalf of another user in Shopping Hub and Employee Center. The punchout supplier site uses that user's credentials and verifies punchout group membership for L1 suppliers.

Key benefits

This functionality extends the existing purchase-on-behalf-of capability (see Purchase on behalf of another user in Shopping Hub) to punchout purchases, and provides the following benefits:

- A super shopper can select whether they are shopping for themselves or on behalf of another user. This selection occurs before starting an L1 punchout session or before completing checkout for an L2 punchout item.
- Eligibility for the selected business owner is validated against the punchout groups configured for the punchout supplier before the shopper can proceed. A business owner who isn't eligible for a supplier's punchout catalog cannot be used to complete the purchase.
- When a business owner is selected, that user's credentials and punchout group membership are used on the punchout supplier site. Any items or orders returned from the punchout site are placed in that user's cart.
- If no business owner is selected, items are placed in the cart of the shopper who is currently logged in.
- Purchasing on behalf of another user is supported from multiple locations. These include punchout search results, supplier and product cards, the Browse supplier page, L2 punchout product details, and L1 punchout entry points in Employee Center.

For step-by-step instructions on purchasing L1 and L2 punchout items on behalf of another user, see Purchase an L1 punchout item on behalf of another user and Purchase an L2 punchout item on behalf of another user.

How to configure

Role required: sn_shop.procurement_administrator

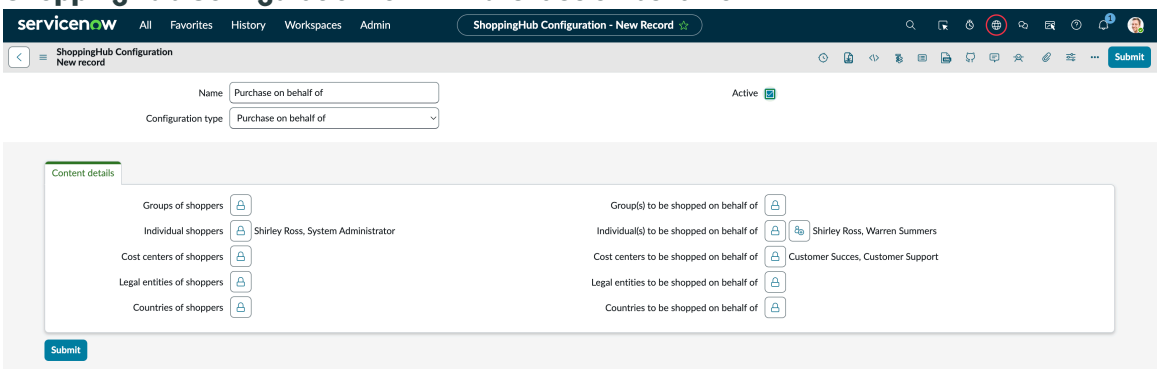
Plugin required: Shopping Hub (sn_spend_uib)

Purchasing punchout items on behalf of another user builds on two existing configurations. Ensure both are set up correctly before shoppers use this capability:

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- Configure the ShoppingHub Configuration record for **Purchase on behalf of**. This record determines which shoppers can use the "shop on behalf of" capability and which individuals or groups they can shop on behalf of. This configuration is used for purchasing on behalf of another user for standard supplier products. It also populates the list of users a shopper can select from when purchasing punchout items on behalf of another user. For configuration steps, see Enable a shopper to purchase on behalf of another user.

ShoppingHub Configuration form — Purchase on behalf of

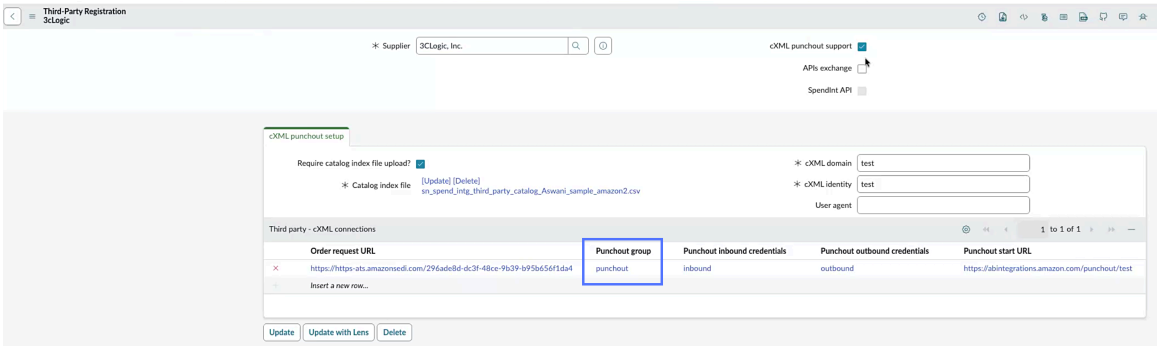


- Configure the **Punchout group** field on the Third-Party Registration record for each punchout supplier (**All** > **Procurement Integrations** > **Setup** > **Third-Party Registration**, then select the supplier). Select the punchout group. For L1 punchout suppliers, only users who are members of the punchout group can purchase punchout items from that supplier, whether they are shopping for themselves or on behalf of another user. A shopper can select any business owner defined in the "Purchase on behalf" of ShoppingHub Configuration. However, the purchase proceeds only if the selected business owner is a member of the supplier's punchout group. If no business owner is selected, the shopper must be a member of the supplier's punchout group. For configuration steps, see Configure punchout for third-party site purchases.

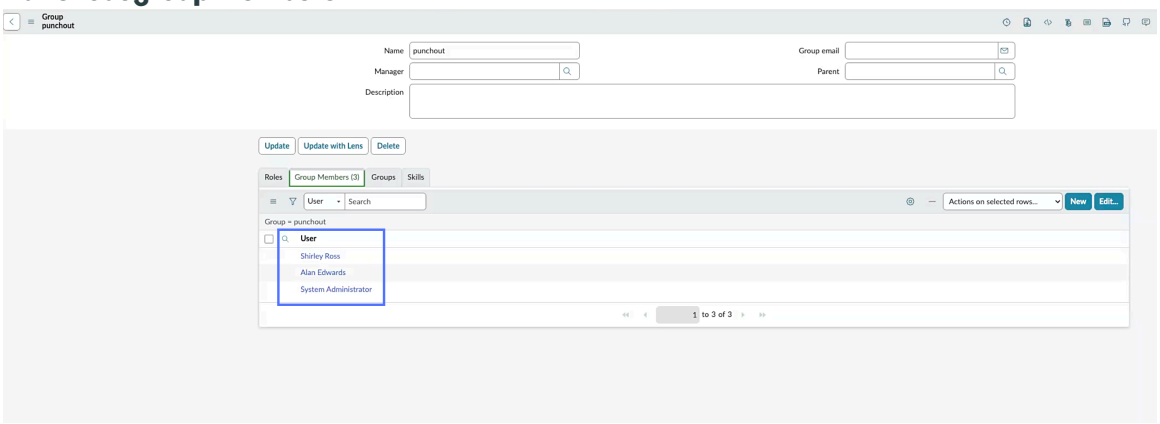
> **Note:** The punchout group membership requirement applies only to L1 punchout suppliers.

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Third-Party Registration form — Punchout group field



Punchout group members



Eligibility validation at purchase time for L1 punchout suppliers

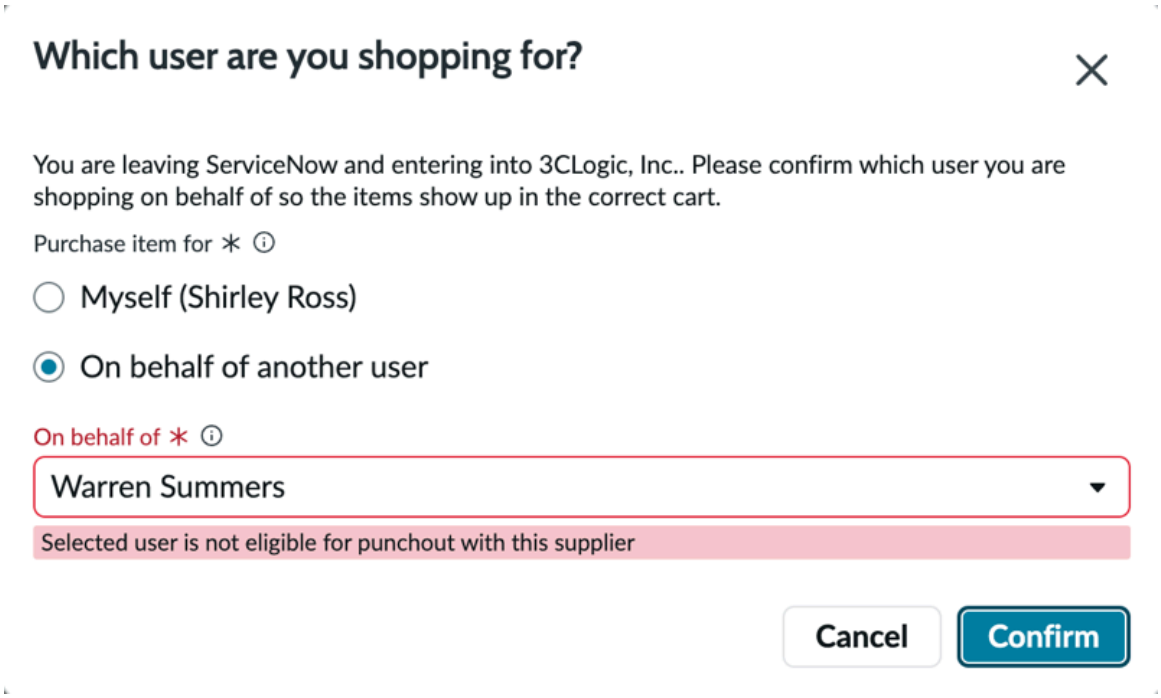
When a shopper selects a business owner, the system checks whether that user is a member of the punchout group configured for the selected supplier's Third-Party Registration record:

- If the selected business owner is a member of the required punchout group, the shopper is redirected to the punchout supplier site (L1).
- If the selected business owner is not a member of the required punchout group, the redirect or checkout is blocked and a validation message is displayed:

  `Selected user is not eligible for punchout with this supplier.`

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Note: The requirement for the target business owner to be a member of the supplier's punchout group applies only to L1 punchout suppliers.



This eligibility check does not affect punchout search or browse performance, and all shopper-facing messages support localization.

How it works: L1 punchout

After a shopper selects a punchout product or service from a search results page, a supplier or product card, or the Browse supplier page, a dialog box opens. The dialog box titled **Which user are you shopping for?** appears before the shopper is redirected to the punchout supplier site.

In the dialog box, the shopper selects one of the following options:

- **Myself** — the shopper's own credentials are used on the punchout supplier site.
- **On behalf of another user** — the shopper then selects a business owner from the **On behalf of** list.

The shopper selects **Confirm** to proceed to the punchout supplier site, or **Cancel** to close the dialog box without starting a punchout session.

How it works: L2 punchout

For an L2 punchout item, the shopper selects whether to purchase for themselves or on behalf of another user. This selection occurs when they select **Request to buy** or add the item to their cart. This replaces the separate redirect dialog box used for L1 punchout. If the shopper is purchasing on behalf of another user, they select the business owner from the same "Buy on Behalf of" list. This list is used for L1 punchout and standard supplier purchases.

After the purchase

After the shopper returns from the punchout supplier site (L1) or completes checkout (L2), the resulting cart lines and purchase are associated with the selected business owner. As with standard supplier purchases, shoppers can use the filter on **My purchases** to view purchases

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made on behalf of other users. For more information, see Purchase on behalf of another user in Shopping Hub.

Purchase an L1 punchout item on behalf of another user

Purchase items from a Level 1 (L1) punchout supplier site on behalf of another user. Select a business owner before the redirect so that items are placed in the correct user's cart.

Before you begin

Verify that the administrator has configured the "Buy on Behalf of" shopping control so that you have at least one eligible business owner to select. The target business owner must be a member of the punchout group required for the supplier you want to purchase from. For more information, see Purchase punchout items on behalf of another user in Shopping Hub.

Note: The requirement for the target business owner to be a member of the supplier's punchout group applies only to L1 punchout suppliers.

Role required: sn_shop.shopper

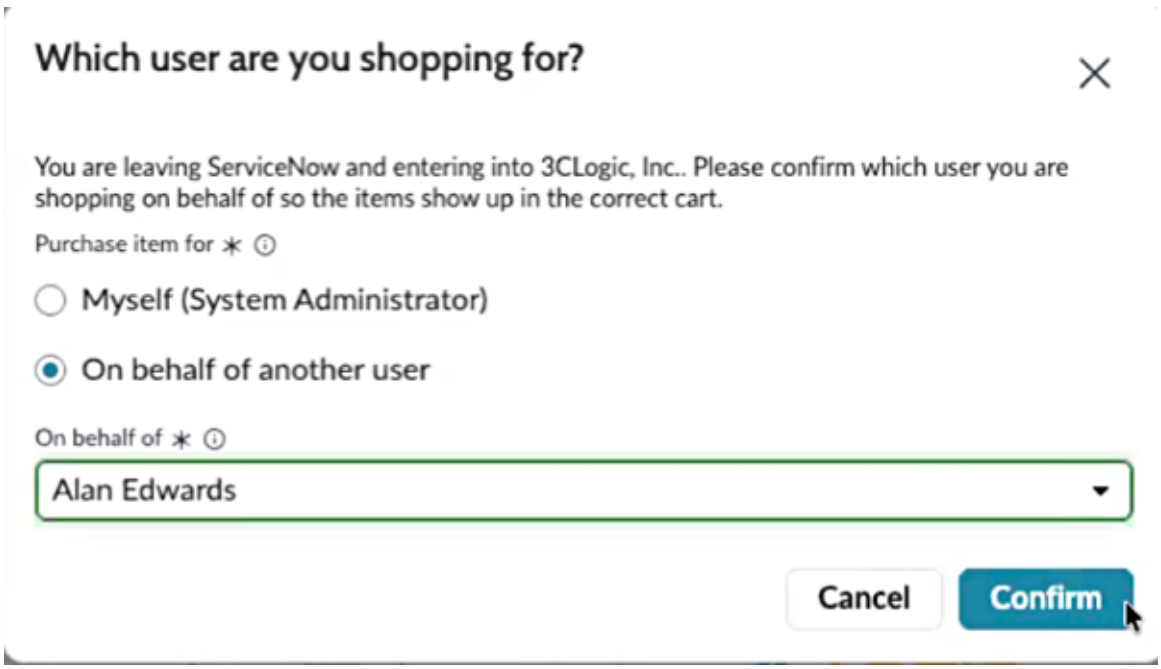
About this task

You can purchase an L1 punchout item on behalf of another user from a punchout search result, a supplier or product card, or the Browse supplier page. Entry points are also available on the Home page, Supplier landing page, Product category page, and in Employee Center.

Plugin required: Shopping Hub (sn_spend_uib)

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Search for or browse to a punchout product or service, and select the item.
   The **Which user are you shopping for?** dialog box opens.
3. Select one of the following options:
   - To shop using your own credentials, select **Myself**.
   - To shop on behalf of another user, select **On behalf of another user**, and then select the business owner from the **On behalf of** list.

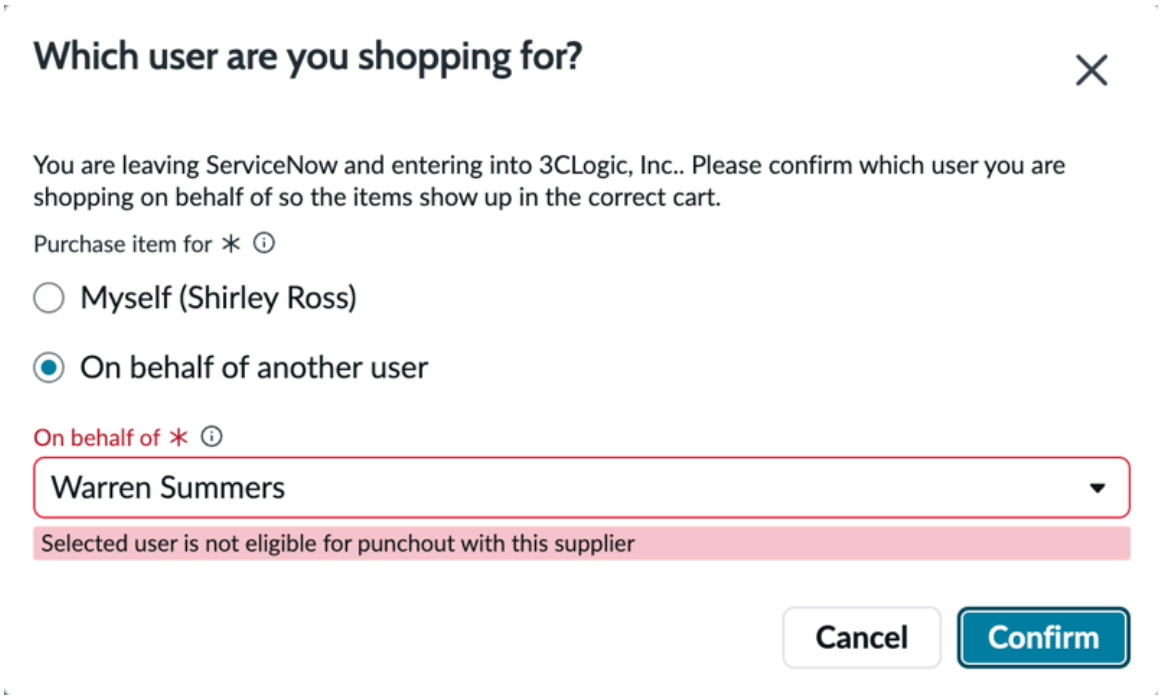


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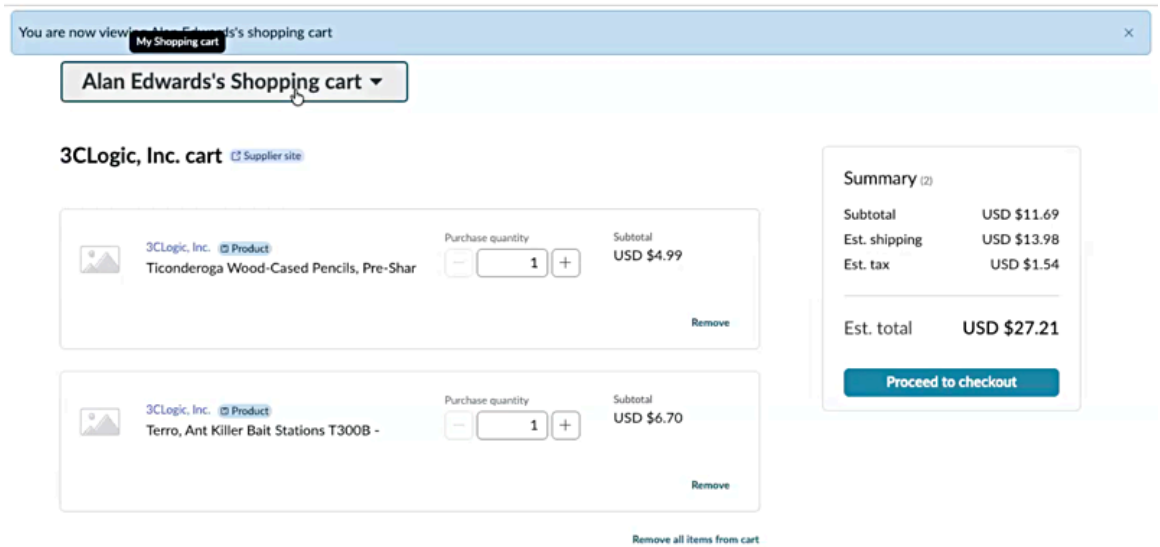
4. Select **Confirm**.

   If the selected business owner is eligible for the punchout supplier, you are redirected to the punchout supplier site using that user's credentials and punchout group membership.

   If the selected business owner isn't eligible, a validation message is displayed and you aren't redirected.



5. On the punchout supplier site, add the required items to your cart, and then return to Shopping Hub or Employee Center to complete checkout.



   For more information, see How L1 punchout works

Result

The items you added on the punchout supplier site are placed in the cart of the selected business owner. If you didn't select a business owner, the items are placed in your own cart.

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Purchase an L2 punchout item on behalf of another user

Select a business owner when you request to buy or add a Level 2 (L2) punchout item to your cart. This validates eligibility and attributes the resulting order to the correct user.

Before you begin

Verify that the administrator has configured the "Buy on Behalf of" shopping control so that you have at least one eligible business owner to select. For more information, see Purchase punchout items on behalf of another user in Shopping Hub.

Role required: sn_shop.shopper

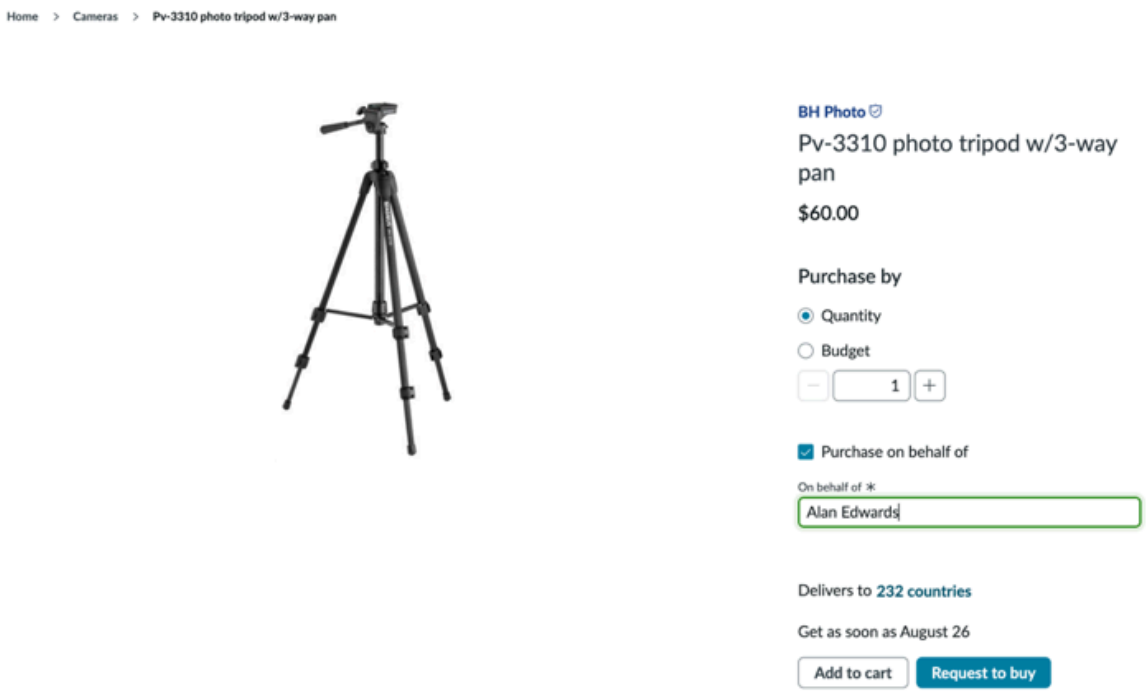
About this task

Unlike L1 punchout, an L2 punchout item is searched, viewed, and added to your cart within Shopping Hub without redirecting to the punchout supplier site. You choose whether you're purchasing for yourself or on behalf of another user when you request to buy or add the item to your cart.

Plugin required: Shopping Hub (sn_spend_uib)

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Search for or browse to a punchout product or service, and select the item.
3. Choose whether you're purchasing for yourself or on behalf of another user.
   - To purchase using your own credentials, choose **Myself**.
   - To purchase on behalf of another user, choose **On behalf of another user**, and then select the business owner from the **On behalf of** list.



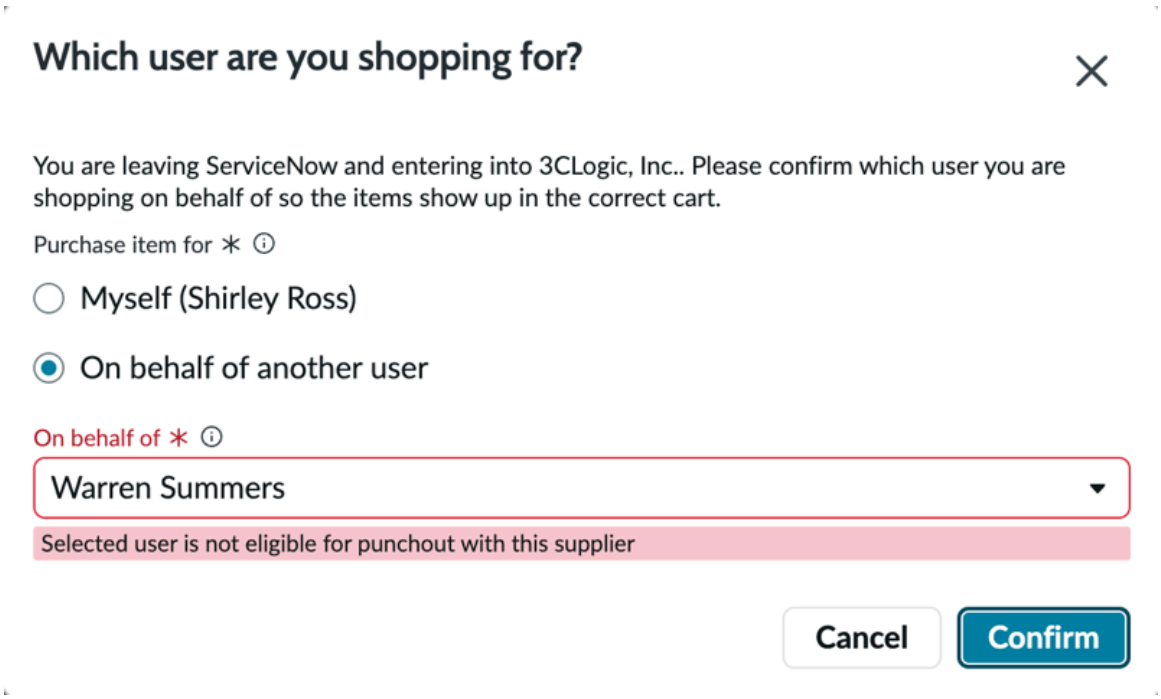
If the selected business owner is a member of the punchout group required for the item, the item is added to your cart, or your request to buy proceeds, on that user's behalf. If the selected business owner isn't eligible, the item isn't added and a validation message is displayed.

4. Select **Confirm**.

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If the selected business owner is a member of the punchout group required for the item, the item is added to your cart, or your request to buy proceeds, on that user's behalf.

If the selected business owner isn't eligible, a validation message is displayed and you aren't redirected.



5. Complete the checkout in Shopping Hub.
   Checkout creates a purchase requisition, and upon approval, a purchase order that's synced with the punchout system. For more information, see How L2 punchout works.

Result
The order created from this purchase is attributed to the selected business owner. If you didn't select a business owner, the order is attributed to you.

Decimal quantity support for service-based purchases in Shopping Hub

As a shopper, you can now specify decimal quantity values for service-based products when you create or edit a purchase requisition (PR) or purchase order (PO) in Shopping Hub.

Note: This capability supports decimal quantities for service#based products only. Applicable for both create and edit actions for both purchase requisitions and purchase orders in Employee Center and Shopping Hub.

Key benefits

This functionality provides the following benefits:

- You can specify decimal quantities for selected service-based products.
- You can enable or disable decimal support for a service product by configuring its UOM.

Important: Starting with Yokohama Patch 12 and Zurich Patch 6, Shopping Hub supports decimal quantities for service-based products. If you upgraded to Yokohama Patch 12 or Zurich Patch 6 and cannot specify decimal quantities for services, you must run a script from the Scripts - Background module. For more information, see Run the fix script to enable decimal quantities for services.

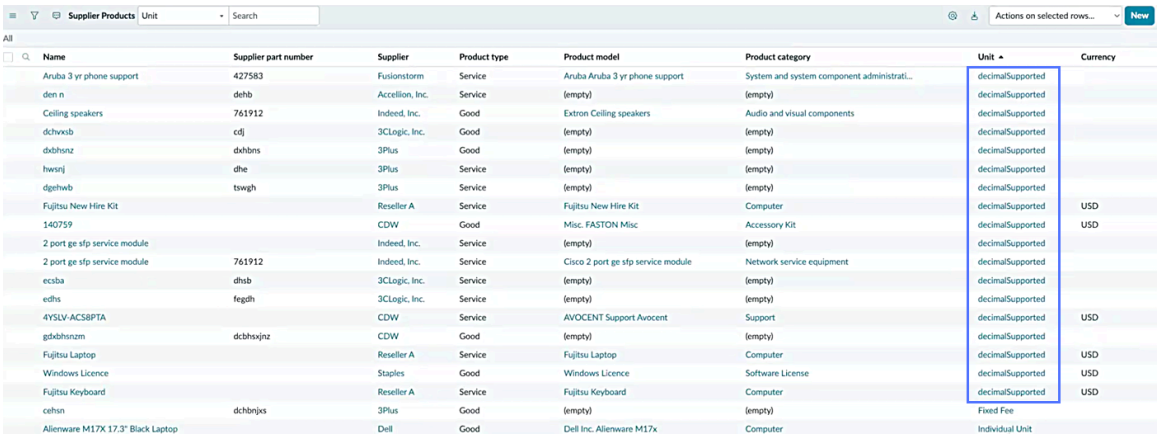
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How to configure

Role required: sn_shop.shopping_hub_admin

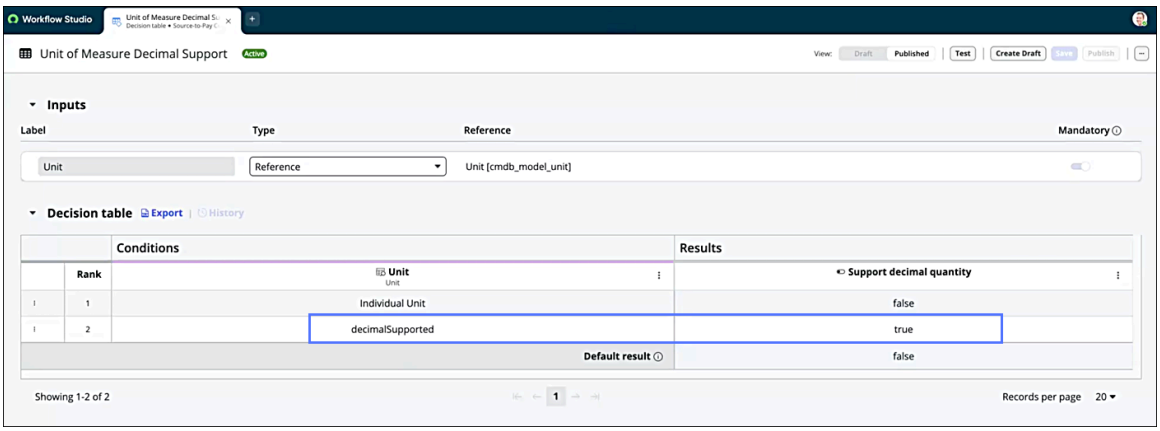
Plugin required: Shopping Hub (sn_spend_uib)

- To enable this capability for a service product, you must configure a unit of measure (UOM) that supports decimal values.



Name	Supplier part number	Supplier	Product type	Product model	Product category	Unit	Currency
Aruba 3 yr phone support	427583	Fusionstorm	Service	Aruba Aruba 3 yr phone support	System and system component administrati...	decimalSupported	
den n	dehb	Accellion, Inc.	Service	(empty)	(empty)	decimalSupported	
Ceiling speakers	761912	Indeed, Inc.	Good	Extron Ceiling speakers	Audio and visual components	decimalSupported	
dchvxsb	cdj	3CLogic, Inc.	Good	(empty)	(empty)	decimalSupported	
dxbhsnz	dxhbns	3Plus	Good	(empty)	(empty)	decimalSupported	
hwsnj	dhe	3Plus	Service	(empty)	(empty)	decimalSupported	
dgehwb	tswgh	3Plus	Service	(empty)	(empty)	decimalSupported	
Fujitsu New Hire Kit		Reseller A	Service	Fujitsu New Hire Kit	Computer	decimalSupported	USD
140759		CDW	Good	Misc. FASTON Misc	Accessory Kit	decimalSupported	USD
2 port ge sfp service module		Indeed, Inc.	Service	(empty)	(empty)	decimalSupported	
2 port ge sfp service module	761912	Indeed, Inc.	Service	Cisco 2 port ge sfp service module	Network service equipment	decimalSupported	
ecsba	dhsb	3CLogic, Inc.	Service	(empty)	(empty)	decimalSupported	
edhs	fegdh	3CLogic, Inc.	Service	(empty)	(empty)	decimalSupported	
4YSLV-ACS8PTA		CDW	Service	AVOCENT Support Avocent	Support	decimalSupported	USD
gdxbhsnzm	dcbhsxjnz	CDW	Good	(empty)	(empty)	decimalSupported	
Fujitsu Laptop		Reseller A	Service	Fujitsu Laptop	Computer	decimalSupported	USD
Windows Licence		Staples	Good	Windows Licence	Software License	decimalSupported	USD
Fujitsu Keyboard		Reseller A	Service	Fujitsu Keyboard	Computer	decimalSupported	USD
cehsn	dchbnjxs	3Plus	Good	(empty)	(empty)	Fixed Fee	
Alienware M17X 17.3" Black Laptop		Dell	Good	Dell Inc. Alienware M17x	Computer	Individual Unit	

- You control decimal quantity support at the UOM level. In the Unit of Measure Decimal Support decision table, set the decimalSupported attribute to true for the required UOM, as shown in the following image.



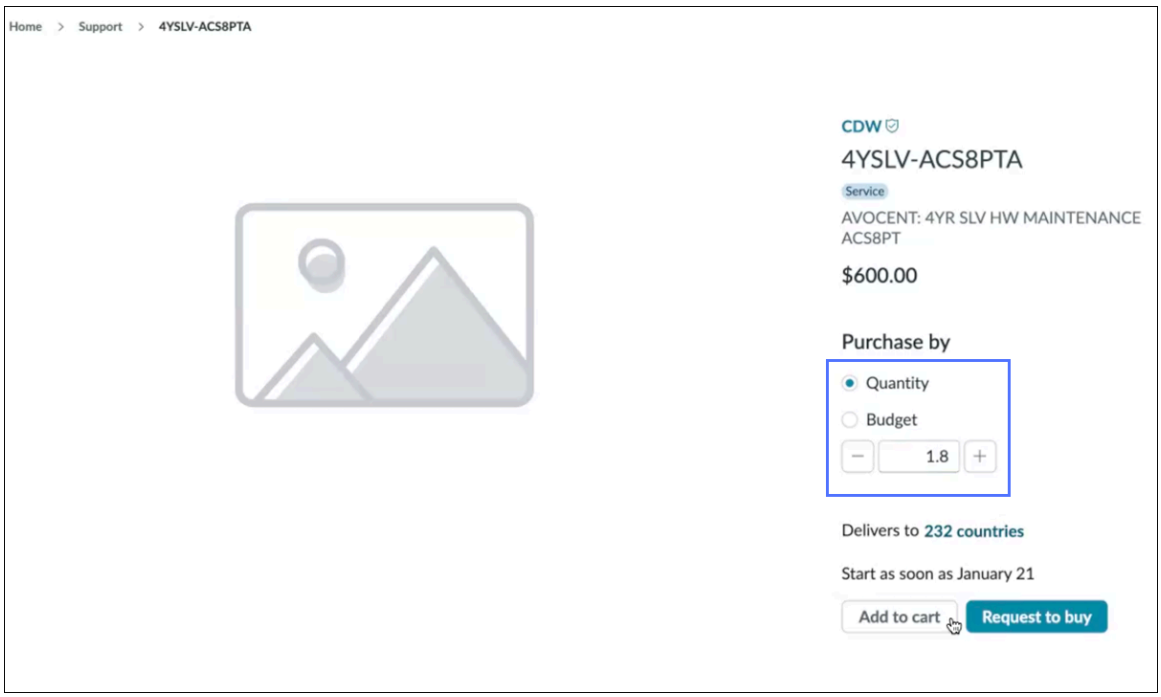
> **Note:** You can use decimal quantities only for products of type Service. You cannot specify decimal quantities for products of type Good, even if the UOM is configured to support decimal values.

How it works

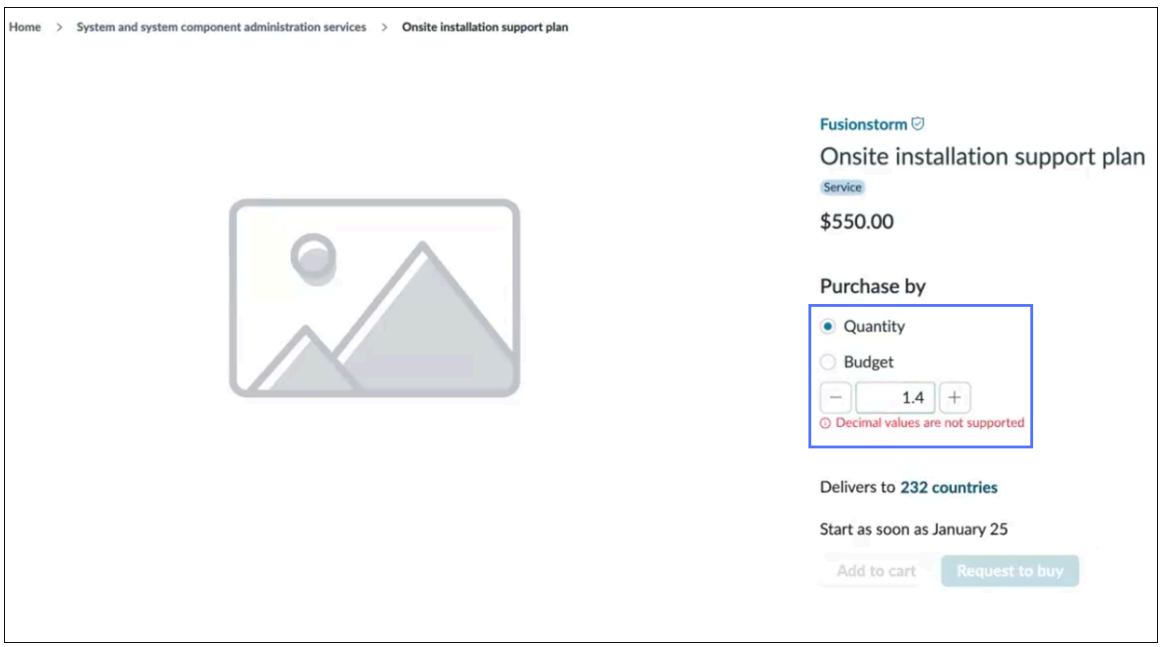
The following points describe how this capability works:

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- When you purchase a product of type Service, you can enter a decimal value in the Quantity field.

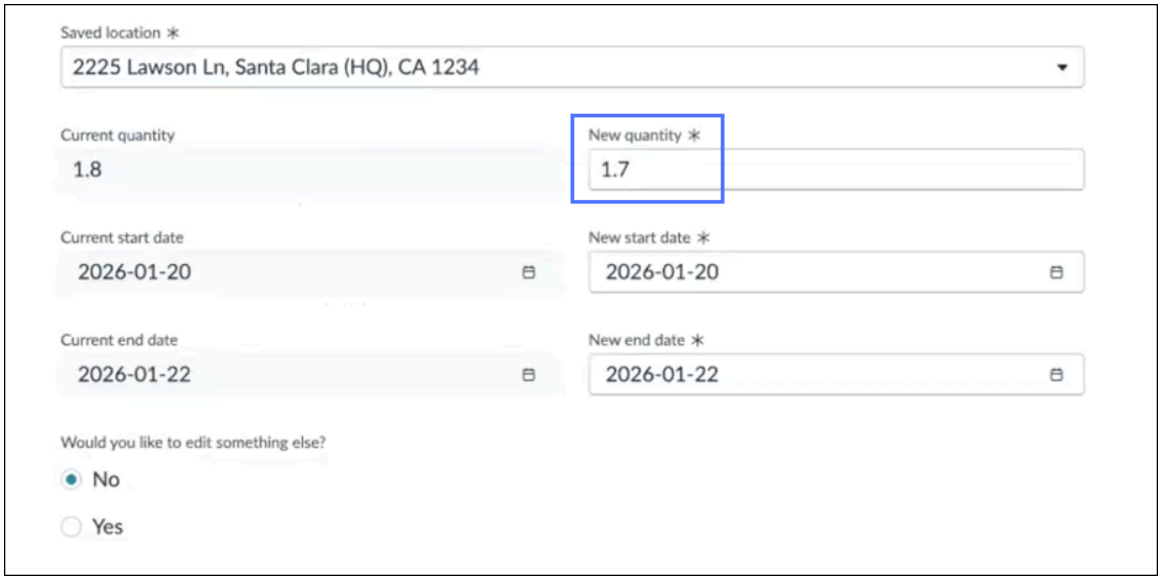


- When you purchase a product of type Good, Shopping Hub prevents you from entering a decimal value in the Quantity field and displays an error message.



- When you edit a PR or PO for a product of type Service, you can enter a decimal value in the New quantity field.

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- When you edit a PR or PO for a product of type Good, Shopping Hub prevents you from entering a decimal value in the New quantity field and displays an error message.



Run the fix script to enable decimal quantities for services

After upgrading to Yokohama Patch 12 or Zurich Patch 6, if you are unable to specify decimal quantities for services, you must run a background fix script to enable support for decimal quantities.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

If you upgraded to Yokohama Patch 12 or Zurich Patch 6 and cannot specify decimal quantities for services, run this script from the Scripts - Background module. The script converts the quantity field type from integer to decimal and updates the field scale to four decimal places.

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Procedure

1. Navigate to **All** > **System Definition** > **Scripts - Background**.
2. In the **Run script (JavaScript executed on server)** section, paste the following code:

```
(function() {
   var tableName = 'sn_spend_sdc_service_request_line';
   var columnName = 'new_purchased_quantity';
   if (pm.isZboot()) {
       return;
   }
   try {
       var updated =
 GlideFixStuff.fixTypeFromIntegerToDecimalCaseLineQuantityItem(
tableName, columnName);
       if (!updated) {
           gs.info('Cannot update type from integer to decimal
 for field ' + columnName);
           return;
       }
       updateScale();
   } catch (ex) {
       gs.info('Cannot update type from integer to decimal with
 error ' + JSON.stringify(ex));
       return;
   }
   function updateScale() {
       var desiredScale = 4;
       var dictGR = new GlideRecord('sys_dictionary');
       var query = 'name=' + tableName + '^elementIN' +
 columnName;
       var fieldName;
       dictGR.addEncodedQuery(query);
       dictGR.query();
       if (dictGR.next()) {
           try {
               var attrbiuteArray = [];
               var currentAttributes = dictGR.attributes;
               if (currentAttributes != '') {
                   attrbiuteArray =
 currentAttributes.split(',');
               }
               var currentMaxLength = dictGR.max_length;
               fieldName = dictGR.element;
               var newMaxLength = currentMaxLength +
 desiredScale;
               dictGR.max_length = newMaxLength;
               attrbiuteArray.push("scale=" + desiredScale);
               dictGR.attributes = attrbiuteArray.join(',');
               dictGR.update();
               dictGR.max_length = newMaxLength + 1;
               dictGR.update();
               gs.info('Updated max length twice for field ' +
 fieldName);
           } catch (ex) {
               gs.info('Cannot update scale attribute due to
 error : ' + JSON.stringify(ex));
```

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```
                gs.error('Error updating max length attribute
 for field {0}. No update performed.', fieldName);
            }
        }
    }
})();
```

3. Deselect the **Record for rollback?** check box.
4. Select **Run Script**.

Managing saved delivery addresses

You can save multiple delivery addresses in Shopping Hub for convenient checkout and purchasing workflows. Over time, you may need to remove addresses you no longer use, such as former work locations, temporary addresses, or duplicate entries.

The address deletion feature provides a safe, auditable way to manage saved delivery addresses.

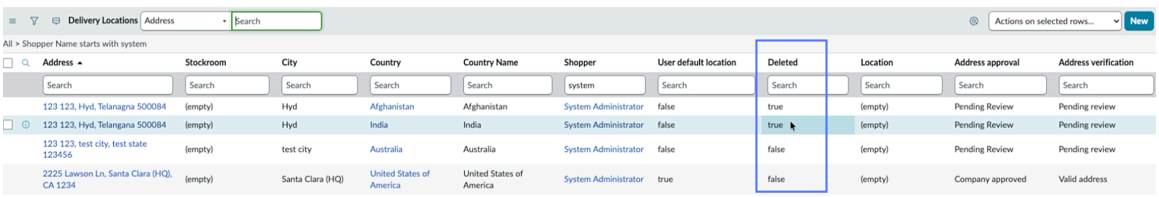
- Delete individual saved addresses from the Shopping Preferences interface.
- Remove multiple addresses in bulk using a multi-select modal.
- Replace default delivery addresses when deleting the currently active default.
- Retain deleted addresses for auditing and recovery.
- Automatically hide deleted addresses at checkout and on off-catalog record producer forms.

Address deletion scenarios

- Single address removal: When you delete a work address you no longer use, a success notification confirms the deletion.
- Default address replacement: You delete your current default delivery address and select a new default using the Manage saved addresses modal.
- Bulk deletion: You can remove multiple addresses at once using the Manage saved addresses modal. You can't delete all addresses at once and must keep at least one saved address.
- Address re-addition: You can re-add a previously deleted address from the work address picker to restore it to your saved list.

Note:

Deleted addresses aren't permanently removed; instead, they are marked with a deleted flag in the `sn_shop_delivery_location` table, enabling auditability and potential future restore operations.



Removing an address clears its default designation. The record's **Deleted** field is set to **true** and its **Default** field is set to **false** in a single update, so a removed address is never left as the default delivery location.

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The `sn_shop_delivery_location` table carries a composite index on the shopper and deleted fields to keep address lookups efficient once the deleted filter is applied to every query.

Related topics

- Delete a saved address
- Address deletion permissions

Delivery address filtering at checkout

Removed delivery addresses are automatically filtered from the checkout address picker, ensuring shoppers see only active addresses when selecting delivery locations.

How address filtering works

When a shopper removes a delivery address from their saved addresses, Shopping Hub marks the address record as deleted in the delivery locations table. The checkout address picker automatically filters out all addresses marked as deleted.

The checkout address picker displays only active delivery addresses:

- Removed addresses do not appear in the picker
- Active addresses appear without disruption
- Filtering occurs automatically without shopper action

Address visibility and restoration

Address visibility depends on the deletion status and context:

- Removed addresses do not appear in the checkout address picker
- Active addresses appear in the delivery location picker
- Removed addresses remain visible in the organization address directory and can be re-added to the saved address list
- Re-adding a removed address restores it as an active delivery option

Cart line address reassignment

When a shopper removes a delivery address that is assigned to cart lines, Shopping Hub automatically reassigns those cart lines to a fallback address:

- Primary fallback: The shopper's session deliver-to location (if active)
- Secondary fallback: The shopper's account default delivery location

Reassignment applies only under these conditions:

- The cart line is owned by the shopper
- The cart line has a status of **Visible in cart** or **Purchasing later**
- The cart has no cart header, or the cart header is in **Draft** or **Active** state

Carts in other states remain unchanged. Cart delivery records in the *sn_shop_cart_delivery* table are not modified by the reassignment.

This ensures that no cart line references an invalid or deleted address when the shopper proceeds to checkout.

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Delivery address filtering in record producers

Off-catalog record producer forms include address fields that enable shoppers to specify delivery locations. Removed delivery addresses do not appear in these fields, consistent with Shopping Hub checkout behavior.

Affected record producers

Address filtering applies to all record producers in the Spend catalog that include delivery address fields:

- Contract renewal for good
- Contract renewal for service
- I need a product
- I need a service
- I need to submit a quote

Address filtering behavior

Address filtering in record producers uses the same pattern as Shopping Hub checkout:

- All address field queries include a `deleted=false` filter
- In the delivery address table, the Deleted column is set to **true** when a delivery address is removed and **false** when it is available
- The filter excludes removed addresses from address field results
- Available delivery addresses appear for selection as normal

Shopper experience

- When filling out a record producer form, only available delivery addresses appear for selection.
- Shoppers can still browse the full organizational address directory when adding a new work address.
- If a user re-adds a previously removed address from the work directory, the address reappears as an available option in record producer forms.
- The same delivery addresses that are unavailable at checkout are unavailable in record producers, providing a consistent experience.

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.

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Related topics

Install Sourcing and Procurement Operations

My purchases on your mobile

As a shopper, you can view all the purchases you made from your shopping account, view their statuses, and revise your purchases.

As a ShoppingHub Administrator, you can configure your mobile instance to display My Purchases on your landing page. For details, see Display My Purchases on your mobile instance.

The fulfilment status of your individual purchases are flagged for your quick reference.

Your purchases are also highlighted with color coding to help you quickly understand their due dates, if any. A red badge is displayed on a purchase if:

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

Similarly, a yellow badge is displayed if any of the above conditions have a due date approaching in seven days. A grey badge is displayed if any of the above conditions have a due date more than seven days.

You can open any purchase to view the details of the purchase and more information associated to your purchase, as applicable, such as additional quotes, receipts, prepayments, and other related lists.

You can track the updates on a selected order from **Activity** > **Activity and Attachments** > **Activity**. You can also compose a message and tag a person you want to address, with "@<primary contact name>", in the **Add Comment** field.

You also have the option to view and upload attachments associated with a purchase from **Activity** > **Activity and Attachments** > **Attachments**.

Filter

You can filter your orders by:

- **Open**:
  - All purchase lines that are not in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision, and the parent sourcing request, negotiation, or purchase requisition not in any of the respective closed states.
  - This is the default option.
- **Closed**:
  - All purchase order lines that are in the state Closed Complete, Closed Paid, or Closed Canceled.
  - All purchase lines that are in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision.
  - Where a purchase order line exists, the corresponding purchase line is not visible.
- **All**: All the orders, irrespective of their state. Where a purchase order line exists, the corresponding purchase line is not visible.

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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.

Important: Check your entitlements to determine whether you have access to Platform Analytics Advanced.

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

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 goals and associated 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

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End user goals and associated roles (continued)

End user and goal	Required role
Procurement Administrator: View and make configuration changes to the widgets.	sn_shop.procurement_administrator

Indicators

- Number of Open Purchasing Task
- Number of Open Purchase Requisition
- Number of Closed Purchase Requisitions - Monthly
- Purchase Requisition - Avg Cycle Time (Days) - Monthly
- Number of Closed Sourcing Requests - Monthly
- Number of Open Sourcing Request
- Number of Open Negotiations
- Sourcing Request - Avg Cycle Time (Days) - Monthly
- Number of Expiring Contracts

Breakdowns

- Cost center
- Department
- Negotiation - AssignedTo
- PurchaseRequisition - AssignedTo
- PurchaseTask - AssignedTo
- SourcingRequest - AssignedTo
- (PSM) Contract End Date Breakdown
- (PSM) Due Date Breakdown

Reports

The Procurement Buyer Dashboard is segregated into the following tabs:

- **My Work**: View all your open sourcing requests, negotiations, purchasing tasks, purchase requisitions, and expiring contracts.
- **My Achievements**: View your achievements, which include your year-to-date total spend, spend categorization, total savings, negotiation outcomes, and average cycle times for sourcing request and purchase requisition.

Note: All the reports pertain to tasks that the logged-in user is assigned to.

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

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Components of Procurement Buyer Dashboard

Title	Type	Description
My Work		
My Open Sourcing Requests	Widget	View your total number of sourcing requests that aren't in a closed state.
My Open Negotiations	Widget	View your total number of negotiations that aren't in a closed state.
My Expiring Contracts	Widget	View your total number of contracts, associated to purchase requisitions in any state, that have an end date of 90 days out.
My Open Sourcing Requests by Due Date	Pie chart	View the breakdown of the count of your open sourcing requests by due date range.
My Open Negotiations by Due Date	Pie chart	View the breakdown of the count of your open negotiations by due date range.
My Expiring Contracts by Due Date	Pie chart	View the breakdown of the count of your expiring 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		

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Components of Procurement Buyer Dashboard (continued)

Title	Type	Description
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 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

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Components of Procurement Buyer Dashboard (continued)

Title	Type	Description
		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 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.

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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 goal and associated roles

End user and goal	Required role
Procurement Specialist Manager: View your organization's strategic and operational performance. You can view your organization's SLA-related details. This role has the same access as a procurement specialist, except that they have access to the manager dashboards.	sn_shop.procurement_specialist_manager
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

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Breakdowns

- Cost center
- Department
- Negotiation - AssignedTo
- ProcurementSLA - HasBreached
- ProcurementUsers - AssignedTo
- Product Category
- PurchaseRequisition - AssignedTo
- PurchaseTask - AssignedTo
- SourcingRequest - AssignedTo
- State
- Supplier
- Task type
- (PSM) Contract End Date Breakdown
- (PSM) Due Date Breakdown

Reports

The Procurement Strategy & Ops Dashboard is segregated into the following tabs:

- **Strategic**: View your organization's strategic performance, which includes year-to-date total spend, spend categorization, total savings, negotiation outcomes, spend by category and supplier, and utilization of active blanket purchase orders.
- **Operations**: View your organization's open sourcing requests, negotiations, expiring contracts, and purchase requisitions and their details.
- **SLA**: View your organization's average time to complete records, breached SLA by record type, and a comparison between average time and SLA time of breached records.

Note: By default, YTD is configured to start from January. However, this can be configured to start from any month if need be.

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

Components of Procurement Strategy & Ops dashboard

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.

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Components of Procurement Strategy & Ops dashboard (continued)

Title	Type	Description
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 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,

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Components of Procurement Strategy & Ops dashboard (continued)

Title	Type	Description
		across the organization, grouped by the category associated to the supplier product on the purchase order line.
Total Spend by Supplier - YTD	List	View the total year-to-date amount across the organization for all standard purchase orders, excluding blanket and closed canceled purchase orders, grouped by supplier. Only standard purchase orders and purchase order releases are considered.
Utilization of Active Blanket Purchase Orders	List	View the released or subtotal percentage of the active blanket purchase orders across the organization that are within the end date.
Operations		
Open Sourcing Requests	Widget	View the total number of sourcing requests across the organization that aren't in a closed state.
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

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Components of Procurement Strategy & Ops dashboard (continued)

Title	Type	Description
		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 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.

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Components of Procurement Strategy & Ops dashboard (continued)

Title	Type	Description
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 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

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Components of Procurement Strategy & Ops dashboard (continued)

Title	Type	Description
		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 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.

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Note: This dashboard is available only if you install the Performance Analytics for Sourcing and Procurement Operations application.

End user and roles

End user goals and associated roles

End user and goal	Required role
Procurement Specialist Manager: View your organization's overall performance. This role has the same access as a procurement specialist, except that they have access to the manager dashboards.	sn_shop.procurement_specialist_manager
Procurement Administrator: View and make configuration changes to the widgets.	sn_shop.procurement_administrator

Indicators

- Number of Total Cost Avoidance Negotiations
- Number of Total Negotiations
- Number of Closed Purchase Requisitions - Monthly
- Number of All Purchase Requisition - Monthly
- Purchase Line Total Negotiated Savings
- Purchase Requisition - Avg Cycle Time (Days) - Monthly
- Number of Closed Sourcing Requests - Monthly
- Purchase Line Negotiated Savings
- Number of Total Contract Terms Negotiations
- Number of Total Negotiation Unsuccessful
- Sourcing Request - Avg Cycle Time (Days) - Monthly
- Number of All Sourcing Request - Monthly
- Parent Line Negotiated Savings
- Number of Total Standard Savings Negotiations

Breakdowns

- Negotiation - AssignedTo
- PurchaseRequisition - AssignedTo
- SourcingRequest - AssignedTo

Reports

Note: By default, YTD is configured to start from January. However, this can be configured to start from any month if need be.

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

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Components of Procurement Team Performance dashboard

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 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

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Components of Procurement Team Performance dashboard (continued)

Title	Type	Description
		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 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.

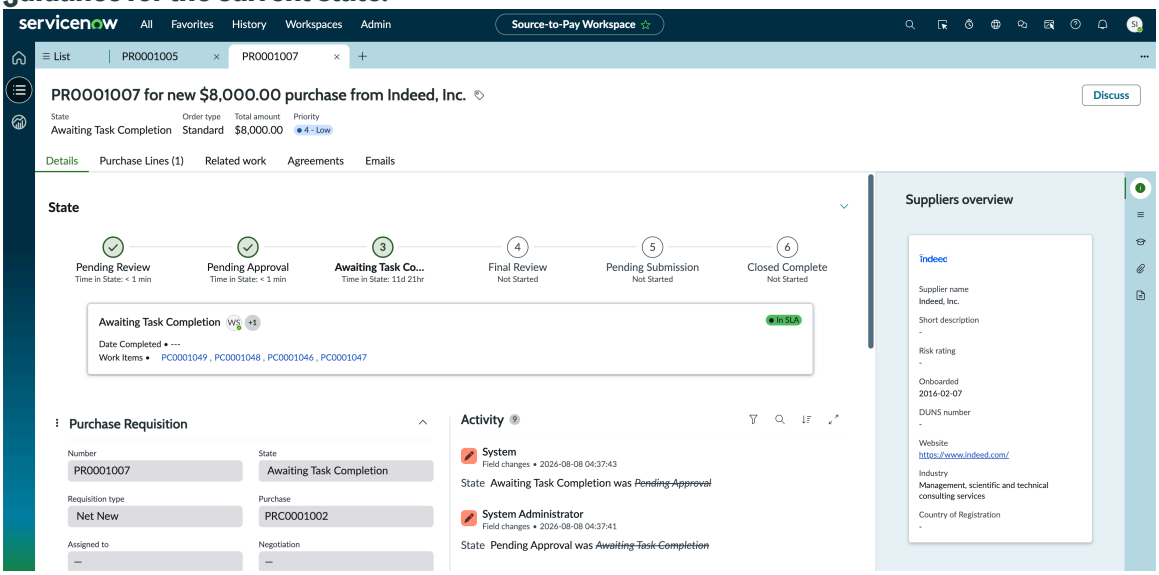
For information on how to work with widgets and data visualizations in configurable workspaces, see Data visualizations in Platform Analytics.

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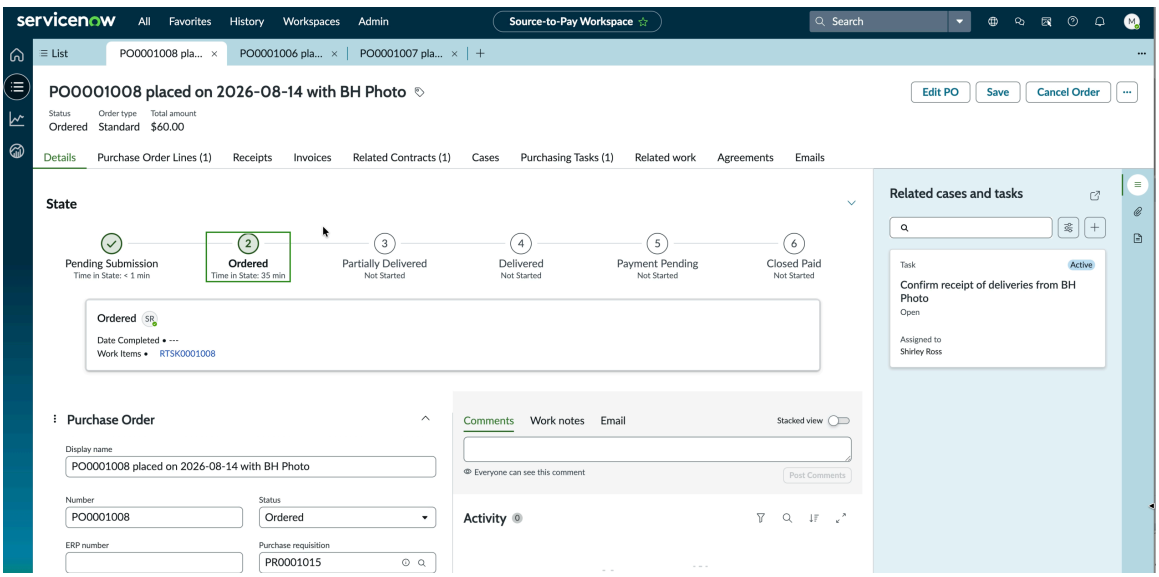
Progress Tracker for purchase requisitions and purchase orders

The Progress Tracker displays the current state of purchase requisition and purchase order records. It shows fulfillers where a request is in the PR-to-PO journey without requiring them to review related records manually.

Purchase requisition Progress Tracker showing stepper, info card, and work items. A purchase requisition record in the Source-to-Pay Workspace showing the Progress Tracker stepper above the Details, Purchase Lines, Related work, Agreements, and Emails tabs. The current step is highlighted, with completed steps marked with green checkmarks and upcoming steps shown as open circles. The info card displays assigned users, pending work items, and contextual guidance for the current state.



Purchase order Progress Tracker showing equivalent stepper component. A purchase order record in the Source-to-Pay Workspace showing the Progress Tracker stepper with the same visual component and interaction pattern as the PR tracker. The stepper displays PO-specific states and persists above the tab navigation. The info card can be expanded by selecting any step, showing PO-specific work item sources such as receipt tasks, invoice tasks, and procurement cases.



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Why the Progress Tracker exists

Before the Progress Tracker, fulfillers had no direct way to determine where a purchase requisition or purchase order was in its process. The **State** field showed only the current state. Understanding what had happened, what was blocking progress, and what needed to happen next required inspecting related approvals, tasks, and audit history manually. The Progress Tracker surfaces that information directly on the record.

Key concepts

State

The current lifecycle position of a PR or PO, such as **Pending Review** or **Partially Delivered**. The tracker represents every possible record state as a step.

State progression (stepper)

The visual, left-to-right sequence of steps that represents the record's journey to closure. The stepper renders above the tab navigation on the record and remains visible regardless of which tab you are viewing.

Happy path

The default, linear sequence of states a PR or PO moves through when the process follows the standard sequence. For example, on a PR: **Pending Review**, **Pending Approval**, **Awaiting Task Completion**, **Final Review**, **Pending Submission**, **Closed Complete**.

Deviations

Non-linear branches away from the happy path, such as a revision loopback, a supplier-confirmation wait for punchout orders, or a cancellation or rejection. The tracker displays a clear path to closure when a record deviates.

Info card

The detail panel that appears when you select a step in the stepper. The panel displays contextual information about that state: who is assigned, when the step completed, which work items are outstanding, and — for deviation states — why the record deviated and what to do next. For detailed information about info card fields, see Progress Tracker component reference.

Who uses the Progress Tracker

Procurement specialists viewing a PR or PO record in the Source-to-Pay Workspace are the primary audience. They read the tracker and info card to understand record status and next steps. Procurement administrators configure which states appear in the tracker and whether the tracker is visible. For related tasks, see View the purchase requisition Progress Tracker, View the purchase order Progress Tracker, and Configure PR and PO Progress Tracker states.

PR progress tracker and PO progress tracker

The PR progress tracker and PO progress tracker share the same underlying stepper component and info-card pattern. Each is driven by its own state model and configuration record because purchase requisitions and purchase orders progress through different states. For the state models, see Purchase requisition state model and Purchase order state model.

Progress Tracker component reference

The Progress Tracker component displays workflow progress on purchase requisitions and purchase orders through a stepper visualization and expandable info card. The info card shows assigned users, pending work items, completion dates, and for deviation states, transition history and alert banners.

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Component overview

The Progress Tracker is a two-part component: a stepper (the workflow visualization at the top) and an expandable info card (details view when a step is selected). The stepper displays workflow states in sequence and highlights the current step. The info card provides contextual details including assigned users, pending work items, and completion dates. For deviation states, the info card also displays a transition history and alert banner explaining why the record deviated.

Stepper placement and persistence

The Progress Tracker stepper renders above the tab navigation on PR and PO records in the Source-to-Pay Workspace details tab. It remains visible across all tabs, providing persistent access to progress information.

Stepper indicators and tooltips

Progress Tracker stepper indicators

Indicator	Description
Per-state duration tooltip	Hovering over a step displays how long the record spent in that state, computed from the record state history.
Pending cases/tasks tooltip	Hovering over a step displays the cases or tasks still pending for that step.
SLA indicator	Displays the time remaining on the record SLA (record-level, not per-step). Distinct from the per-state duration tooltip, which is scoped to a single step.
State text labels	Labels in the stepper reflect the record actual state names and are not paraphrased.
Step completion icons	Completed happy-path steps display a green checkmark. Closed Rejected and Closed Canceled display a red X icon on the terminal step.

The stepper itself does not display avatar bubbles; avatars appear only in the expandable info card.

Info card fields

Select a step in the stepper to expand an info card with the following fields:

State badge and avatars

Displays the current state label as a badge with assigned user avatars. Up to 8 avatars display inline (1 primary plus 7 in the overflow row). An ellipsis trigger appears only when you select the "+N" badge, never on initial load, and only when more than 8 assignees exist.

Date Completed

Displays the date the step finished, or "---" if the step is still in progress.

Work Items

Links to related work items for the step (for example, task or approval records). When no linked records exist, this field displays contextual guidance describing the next action instead of a list of links.

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Transition history

Displays only for deviation states. A chronological log of state changes with timestamp, actor, and a short description for each entry. Each entry is selectable and surfaces further context.

Alert banner

Displays only for deviation states. Appears at the top of the State section and explains why the record deviated and, where applicable, what action is needed.

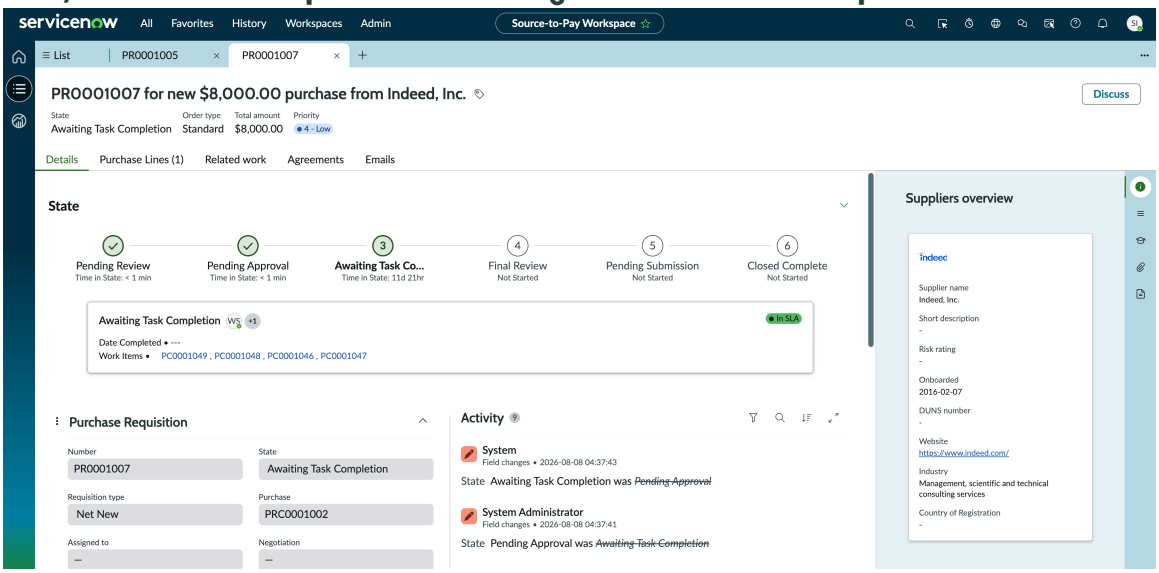
Info card content by state category

Info card fields shown per state category

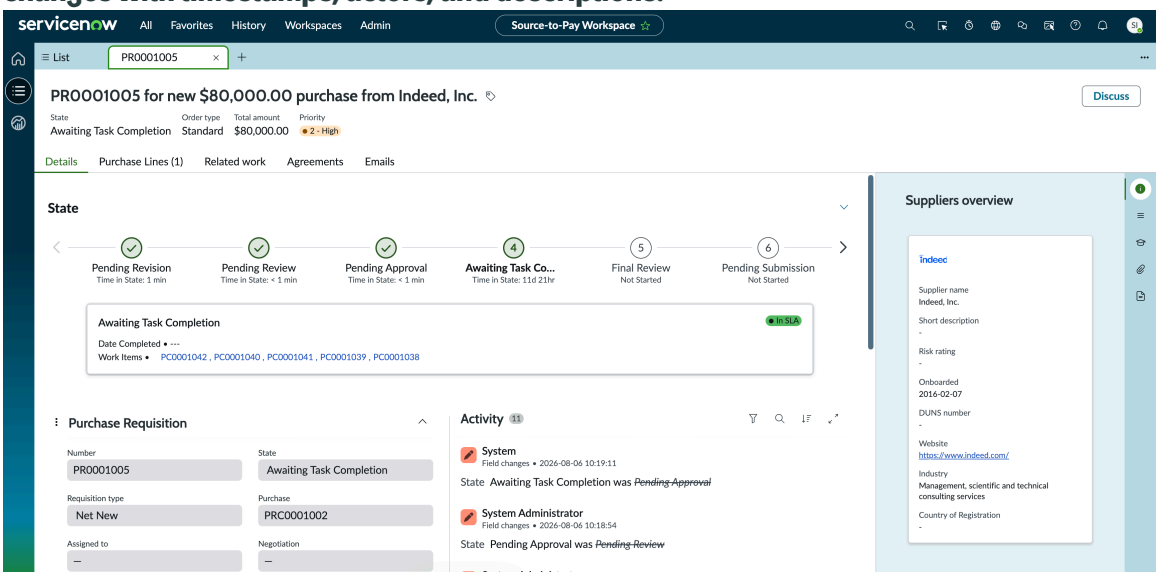
State category	Badge	Date Completed	Work Items	Transition history / Alert banner
Happy path (in progress)	Current state	"---"	Links to related work items	Not displayed
Happy path (completed step)	Step state	Actual date	Contextual guidance message	Not displayed
Pending Revision	"Pending Revision"	Not displayed	Guidance to resubmit	Displayed (chronological log); displayed (revision trigger and date)
Closed Rejected	"Closed Rejected"	Actual date	Empty or not applicable	Optional; displayed (rejection cascade and date)
Closed Canceled	"Closed Canceled"	Actual date	Empty or not applicable	Optional; displayed (cancellation reason and date)

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Progress Tracker info card for happy-path state. A Progress Tracker info card expanded for an in-progress happy-path step (Awaiting Task Completion), displaying the state badge with assigned user avatars, pending work items as links, and the Date Completed field showing "---" to indicate the step is still active.



Progress Tracker info card for deviation state. A Progress Tracker info card expanded for a Pending Revision deviation state, displaying an alert banner at the top explaining why the record deviated, the state badge showing "Pending Revision", and a chronological transition history log displaying previous state changes with timestamps, actors, and descriptions.



Click behavior

Work item links navigate to the linked record within the same workspace tab; no new browser tab opens. Transition history entries are selectable and surface a contextual popover or navigate to the related approval or activity record. For step-by-step instructions on using the info card, see Use the Progress Tracker info card.

PO-specific info card content

On PO records, the **Work Items** field is populated from receipt task, invoice task, service acknowledgment task, spend task, milestone, and procurement case records depending on

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the current state. This differs from PR records, which use approval or fulfillment tasks. When no task-based assignee exists for a state, the info card falls back to a configured header field (for example, the PO business owner) for selected states only.

Permanently locked fields

The **Submitted by** field is permanently read-only (*strict_read_only*) on both the Sourcing Activity (SRC) record and the Purchase Requisition (PR) record. This lock applies regardless of the record current Progress Tracker state, and it is not exposed as an administrator-configurable option. The state-configuration task does not control field-level locking.

System properties for Progress Tracker visibility

Two system properties control whether the Progress Tracker displays on purchase requisition and purchase order records. The procurement administrator role is required to read or write these properties.

System properties

Progress Tracker visibility properties

System property	Description
sn_spend_workspace.pr.progress_tracker_UI.enabled	Controls whether the Progress Tracker displays on purchase requisition records in the workspace. When set to true, the tracker shows the states the purchase requisition progresses through.
sn_spend_workspace.po.progress_tracker_UI.enabled	Controls whether the Progress Tracker displays on purchase order records in the workspace. When set to true, the tracker shows the states the purchase order progresses through.

Property attributes

Attribute	Value
Type	true | false
Default	true
Read/Write role	sn_shop.procurement_administrator
Application	Source-to-Pay Workspace
Suffix	PR: *pr.progress_tracker_UI.enabled*; PO: *po.progress_tracker_UI.enabled*

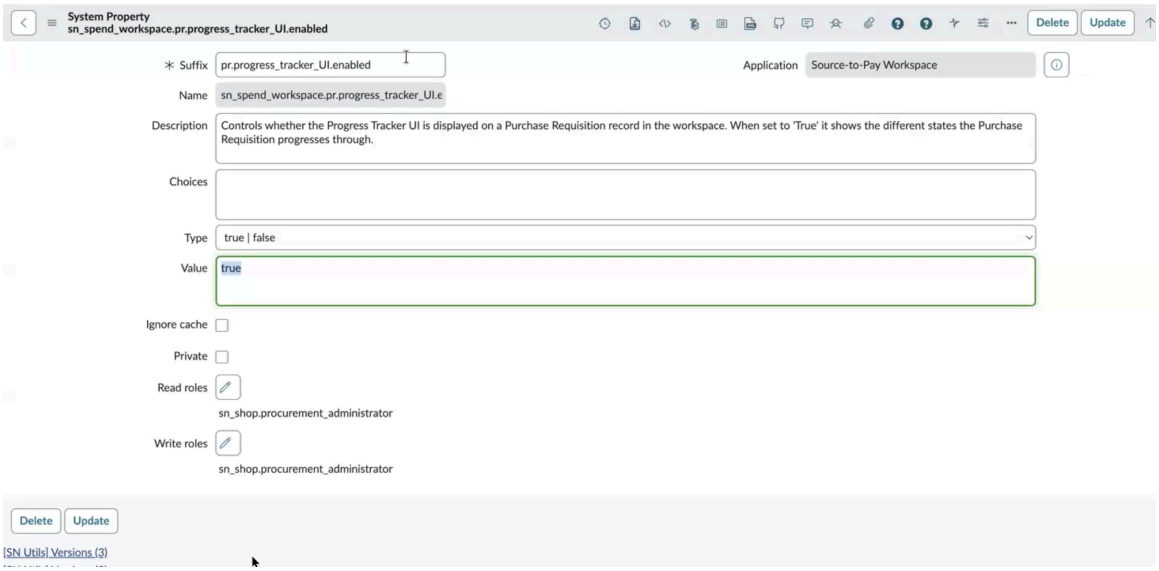
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Property attributes (continued)

Attribute	Value
Ignore cache / Private	Both cleared (default) on the purchase requisition record.

The record form header and the area below the Write roles field each show **Delete** and **Update** buttons. Select **Update** to save a changed value in the **Value** field.

System property record for Progress Tracker visibility (purchase requisition example). System property record showing configuration fields including Suffix, Application, Type, Value, and role assignments. Update and Delete buttons appear in the form header and below the Write roles field.



Required administrator role

A user must have the sn_shop.procurement_administrator role to read or change either property.

Sourcing and Purchasing Automation

Sourcing and Purchasing Automation for ShoppingHub includes workflows that help support the user interface purchasing experience for the shopper. These workflows consist of sourcing requests, negotiations, purchase requisitions, contracts, purchase orders, receipts, and invoices.

Important: Check your entitlements to determine whether you have access to Sourcing and Purchasing Automation.

Related topics

Install Sourcing and Procurement Operations

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.

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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** > **Source-to-Pay Workspace**, and select the List icon (), followed by **All team 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 ShoppingHub, the information that the shopper provides is mapped to the fields of a sourcing request as follows:

Sourcing request fields

Field	Description
Number	System-generated unique identifier of the sourcing request.
Assigned to	User who is responsible for the purchase. Determined using purchasing assignment rules. For details, see Create a purchasing assignment rule.
Business owner	User who owns the sourcing request.
Submitted by	User who has shopped and submitted the purchase.
Status	Status of the sourcing request. **Note:** This is a read-only field.
Purchase	Related purchase, if any.
Sourcing 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.

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Sourcing request fields (continued)

Field	Description
Supplier responses close	Date by which the suppliers must submit their responses to the sourcing activity.
Benchmark price	Price point from which all starting unit costs for all the purchase lines of this sourcing requests are derived.
Request type	Type of request that the shopper, employee, or requester is asking for. The options are request for quote, request for information, request for proposal, and proof of concept.
Sourcing request details	Details of the sourcing request.

The following are the related lists of a sourcing request record:

Sourcing request related lists

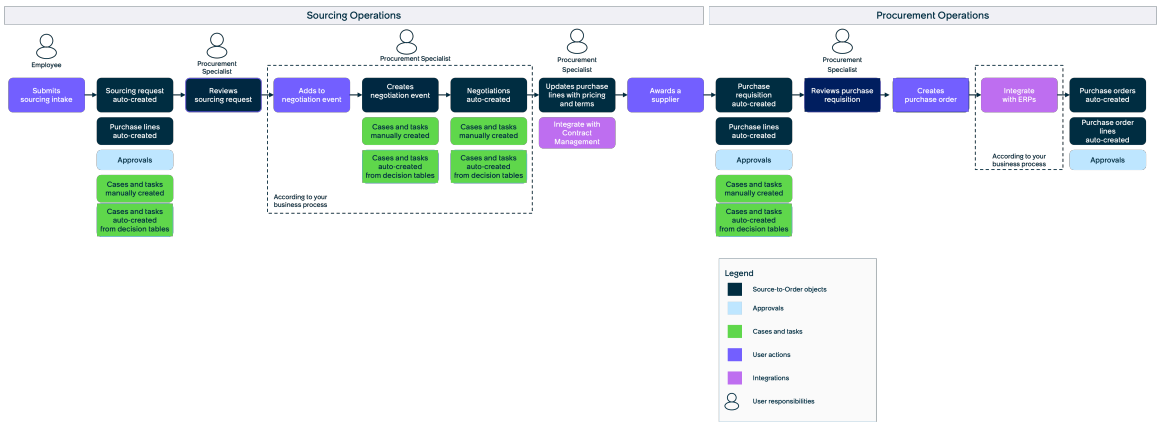
Related list	Description
Purchase Lines	Provides information of the individual lines under a sourcing request for the referenced supplier. The number of purchase lines for a sourcing request depends on the number of products or services with the same product model. For more details, see Purchase lines.
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.

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Sourcing request related lists (continued)

Related list	Description
	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 (sn_spend_clm) installed.
Approval Plans	Displays all the approval plans created against this sourcing request.
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.

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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 sourcing events (NEs) and negotiations (NEGs) are considered in the sourcing flow, consider the following scenarios:

- Qualification is needed, where NE is in the Planned state, and NEG, SR, and PRL are all in the Qualification Needed state:

  If a price is entered on a PRL, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state. All the other PRLs without price and the SR continue to remain in the Qualification Needed state. Once qualified, the SR and other PRLs that are in the Qualification Needed state move to the Qualified state, while the PRL that had price remain in the Pricing Obtained state.

- NEG is in progress, where NE is in WIP, and NEG, SR, and PRL are all in the Negotiation in Progress state:

  If a price is entered on a PRL when NEG is in progress, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state. All the other PRLs without price and the NEG and SR remain in the Negotiation in Progress state, while the NE remains in WIP.

- New SRs or suppliers are added after **Start negotiating** is selected on the NE, where NE is in WIP, and NEG, SR, and PRL are all in the Negotiation in Progress state:

  This triggers qualification cases to be evaluated on the affected PRLs and move the NEG to Qualification Needed. If qualification isn't needed, both the NEGs and the newly created PRLs remain in the Negotiation in Progress state.

  If qualification is needed, NEs remain in WIP even when new SRs or existing suppliers are added. Once qualification cases are complete, Individual NEGs automatically move from Qualified to Negotiation in Progress, without the need to re-select **Start negotiating** on the NE. The newly evaluated PRLs also move to Negotiation in Progress.

  However, at any point, if a price is entered on any of the newly created PRLs, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state.

The default states that are available for a sourcing request are listed.

- Pending Approval
- Pending Review
- Information Needed
- Qualification Needed
- Qualified
- Pending Negotiation

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- Negotiation in Progress
- Pending Resubmission
- Awaiting Supplier Response
- Awaiting Task Completion
- Requires Decision
- Closed Complete
- Closed No Decision
- Closed Canceled
- Closed Rejected

For more information on NEGs and NEs, see Negotiations and Sourcing 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.

For a list of all sourcing request states and the conditions that trigger each state change, see Purchase requisition, purchase order, and sourcing request states.

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	
Sourcing event	Sourcing 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.

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Negotiation fields (continued)

Field	Description
Negotiation outcome	Result of the negotiation. For example, you can negotiate contract terms or savings on a purchase.
Expected start	Expected start date of the negotiation.
Actual start	Actual start date of the negotiation.
Actual end	Actual end date of the negotiation.
Duration	Duration of the negotiation.
Negotiation objectives	Objectives or goals for the negotiation.
Close notes	Notes on closure of the negotiation, if any.

The following are the related lists of a negotiation:

Negotiation related lists

Related list	Description
Sourcing Requests	View and track all the sourcing requests associated with the purchase lines in the negotiation. For details, see Sourcing request.
Purchase Lines	View and track all the purchase line records within the parent purchase for the supplier referenced on the negotiation. For details, see Purchase lines.
Purchasing Tasks	View information on all the purchasing tasks that are related to the negotiation. For details, see Purchasing tasks and procurement cases.
Cases	View information on all the cases that are related to the sourcing 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.

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Negotiation 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 (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.

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

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- Closed No Decision
- Closed Rejected
- Closed Canceled

Sourcing events

Sourcing 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 sourcing 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 sourcing event as child entities.

Through this sourcing 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 sourcing event.

Sourcing events can be best viewed from the Source-to-Pay Workspace list page.

Here's a list of key fields of a sourcing event:

Sourcing event fields

Field	Description
Number	System-generated unique identifier of the sourcing event.
Assigned to	User who is responsible for the sourcing event.
State	Current state of the sourcing 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 sourcing event.
Description	Details of the sourcing event.
Summary	
Negotiation type	Type of sourcing 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 sourcing event.

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Sourcing event fields (continued)

Field	Description
	For example, you can negotiate contract terms or standard savings on a purchase.
Expected start	Expected start date of the sourcing event.
Actual start	Actual start date of the sourcing event.
Actual end	Actual end date of the sourcing event.
Duration	Duration of the sourcing event.
Negotiation objectives	Objectives or goals for the sourcing event.
Close notes	Notes on closure of the sourcing event, if any.

The following are the related lists of a sourcing event:

Sourcing event related lists

Related list	Description
Sourcing Requests	View all the sourcing requests that are mapped to this sourcing event. For details, see Sourcing request.
Negotiations	View all the negotiations with each supplier that are mapped to this sourcing 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 sourcing event. For details, see Purchase lines.
Purchasing Tasks	View information on all the purchasing tasks that are related to the sourcing event. For details, see Purchasing tasks and procurement cases.
Cases	View information on all the cases that are related to the sourcing event.
Draft Contracts	View and track all the draft contracts for the suppliers referenced on the sourcing event. For more details, see Contracts.
Signed Contracts	View and track all the signed contracts for the suppliers referenced on the sourcing event.

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Sourcing event related lists (continued)

Related list	Description
Other Legal Documents	View and track all the other legal documents for the suppliers referenced on the sourcing event.
Contract Requests	Displays all the associated contract requests against this sourcing event. **Note:** This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (sn_spend_clm) installed.
Purchase SLAs	View all the purchase SLAs associated to purchasing tasks against the sourcing 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 sourcing 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.

Sourcing event workflow

The default states that are available for a sourcing event are listed.

- Draft
- Planned
- Work in Progress
- Pricing Obtained
- Awaiting Task Completion
- Requires Decision
- Closed Complete
- Closed No Decision
- Closed Canceled

Purchase requisition

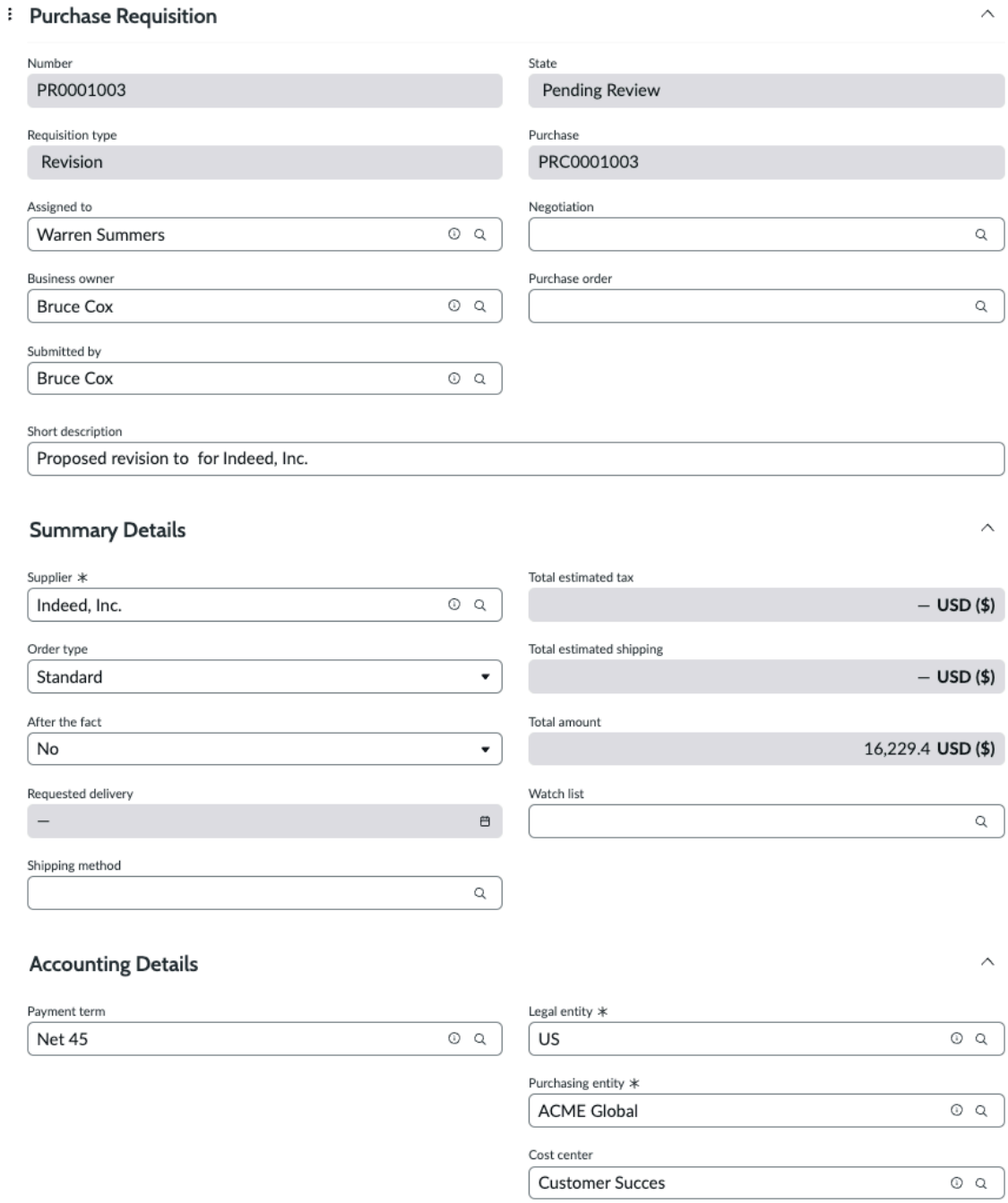
A purchase requisition represents a request that is sent internally within an organization to obtain purchased goods or services. It consists of items that need to be ordered, and may need to go through approvals for a purchase order to be created.

A purchase requisition is created in either of the following scenarios:

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- When a shopper selects **Request to buy** from a product details page on ShoppingHub.
- When a supplier is selected after providing quotes in a sourcing request.

Through a purchase requisition, the purchasing department understands details of the items that are requested, the quantity, supplier, cost, and reason for



purchase.

Purchase requisition fields

Field	Description
Number	System-generated unique identifier of the purchase requisition.
Requisition type	Indicates if this requisition is net new or a revision.

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Purchase requisition fields (continued)

Field	Description
	The shopper can revise the quantity of the product or delivery location for on order from ShoppingHub 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.
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.

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Purchase requisition fields (continued)

Field	Description
	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.
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.

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Purchase requisition fields (continued)

Field	Description
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.
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

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Purchase requisition related lists (continued)

Related list	Description
	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 (sn_spend_clm) installed.
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

  For more information on how the auto-order properties affect purchase order creation, see Purchase requisition auto-order.

- 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

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- Final Review
- Pending Submission
- Closed Complete
- Closed Canceled
- Closed Rejected
- Pending Cancellation
- Pending Revision
- Pending Supplier Confirmation

For a list of all purchase requisition states and the conditions that trigger each state change, see Purchase requisition, purchase order, and sourcing request states.

Handling fees

Configure the conditions of a purchase request that, met, add 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 use 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 used, the handling fee is calculated as a percentage of the total amount of all 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. The handling fee purchase line is view-only and visible from the **My purchases** tab.

Note: Handling fees support fixed amounts and percentage-based pricing only. Tiered or break-based pricing is not available for handling fees.

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

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purchases aren't enabled in this scenario. The grouping logic determines if the line can be automatically merged with an existing purchase requisition.

The key fields of a purchase line are as follows:

Purchase line fields

Field	Description
Number	System-generated unique identifier of the purchase line.
Supplier	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 Fields in the 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.

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Purchase line fields (continued)

Field	Description
	For a non-catalog purchase, this information is obtained from the **Do you have an example of what you're looking for?** field on ShoppingHub. 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 ShoppingHub. 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.
Sourcing event	Sourcing 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 ShoppingHub. This field isn't displayed if the product type is handling fees.

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Purchase line fields (continued)

Field	Description
Purchase reason	Reason for the purchase that the shopper provides before checkout. For a non-catalog purchase, this information is obtained from the **Why do you need this?** field on ShoppingHub. This field isn't displayed if the product type is handling fees.
Handling fee	Charges added for a specific supplier when a rule is triggered as a result of certain configurable conditions for a purchase requisition being met. For more information on handling fees, see Handling fees. This field is displayed only if the product type is handling fees.
Specific requirements	Requirements that the shopper specifies. For a non-catalog purchase, this information is given in the **Any specific requirements** field on ShoppingHub.
Purchasing Details	
Spend categorization	Indicates whether negotiation with the supplier is addressable or not.
Negotiated by	Indicates who is responsible for negotiation.
Product type	Indicates whether the ordered product type is a good, service, or handling fee.
Goods receipt required	Indicates if a receipt is required in addition to the invoice. This field is visible only if the product type is **Good**.
One-time pricing	Indicates if the pricing created for a service can be reusable in subsequent purchase requests. When created in the context of a sourcing request or negotiation for a service, the default value is **Yes**. This field is visible only if the product type is **Service**.
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. **Note:** If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you.
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.

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Purchase line fields (continued)

Field	Description
	When the shopper selects a time frame, the order is considered a blanket type order.
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	

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Purchase line fields (continued)

Field	Description
Fields in the Delivery Details section map to the information from delivery location details that the shopper provides. Shipping method is displayed as a read-only field here. However, this section isn't displayed if the product type is handling fees.	
Accounting Details	
Product category	Category to which the supplier product belongs.
Capex account	Ledger account to post the capital expenses of this product after the purchase completion.
Expense account	Ledger account to post the operational expenses of this product after the purchase completion.
Payment schedule	Indicates the schedule of payments to the supplier.
Pre-payments required	Indicates if pre-payments can be credited to the supplier against this purchase.
Legal entity	Internal legal entity that incurs the cost of this purchase.
Cost center	Cost center that incurs the cost of this transaction.

The capex account, expense account, and pre-payment details are populated from ledger assignment rules.

The following are the related lists of a purchase line:

Purchase line related lists

Related list	Description
Cases	Displays all the cases associated with this purchase line.
Purchasing Tasks	Provides information of tasks such as obtaining more information from the requester, or awarding a supplier after quotes are received. 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.

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Purchase line related lists (continued)

Related list	Description
Milestones	Provides information of all the milestones for this purchase. This related list is visible only if the acknowledgment type is set to **Milestones**. For details, see Milestones.
Cost Allocations	Provides the information on cost allocation type and the cost center for this purchase line. For details, see Cost allocations.
Pre-payments	Provides information of the pre-payment details such as the amount and the payment date for this purchase. This related list is visible only if the **Pre-payments required** field is checked. For details, see Pre-payments.
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 (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,

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Milestone fields (continued)

Field	Description
	milestones, invoices, or other activities related to acknowledgment. This field is populated or updated with the same user in the **Assigned to** field of the parent task record, as follows: For a milestone or acknowledgment task, from the referenced purchase order.
Purchase line	Purchase line associated with the milestone.
Purchase order line	Purchase order line associated with the milestone.
State	Status of the milestone.
Due date	Expected completion date from the user this milestone is assigned to.
Summary Details	
Completion date	Scheduled completion date for the milestone.
Payout type	The type of the payout associated with this milestone. For example, **Percentage** or **Amount**.
Payout amount	Amount associated with this milestone. This field is displayed if the payout type is set to **Amount**. Sum of the amount across all milestones can't exceed the total amount on the purchase requisition.
Payout percentage	Percentage of the payout amount associated with this milestone. This field is displayed if the payout type is set to **Percentage**. Sum of the percentages across all milestones can't exceed 100%.
Cancellation reason	Reason for the cancellation of the milestone. This field is required when the recipient cancels the milestone.
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 ShoppingHub 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 ShoppingHub, and it has the same submitted by, supplier, cost center, and business owner as PR1, then the lines are automatically grouped with PR1 with the state Pending Approval. PR1 remains in Pending Approval state. Approvals are re-assessed similar to revisions. If the line was created more than 24 hours after PR1, it is not grouped automatically and is created under a new purchase requisition.

- Sourcing required:

  If the shopper adds a supplier product from the same Supplier A in ShoppingHub that does not have an active contractual price, a sourcing request is created. In the sourcing request, assuming that the line was awarded to the same Supplier A, and there is an existing purchase requisition with the same submitted by, supplier, cost center, and business owner, and the newly sourced line was created not more than 24 hours after PR1, the purchase line references PR1 when the supplier is awarded, and a purchase requisition is created. The line is added into PR1 with the state Pending Approval. PR1 remains in Pending Approval state. Approvals are re-assessed similar to revisions.

Scenario 2: PR1 for Supplier A exists, in state Awaiting Task Completion. PO does not exist yet.

- A procurement specialist has to manually merge the purchase requisitions.
- Sourcing not required:
  - An annotation is displayed on the header of PR2 indicating that this purchase requisition can be merged with another existing requisition <purchase requisition number>, where <purchase requisition number> is a link to PR1 that has the same submitted by, supplier, cost center, and business owner as PR2. This annotation is cleared once an order is created against PR1.
  - The user can select **Merge** on the PR2 header to move the lines from PR2 to PR1. If there are no other requisitions or sourcing requests belonging to the purchase request that PR2 belongs to, then the purchase request and PR2 are deleted. The merged lines are in the state Pending Approval, and the purchase requisition is also reverted to Pending Approval. However, the original lines remain in their original state. Approvals are re-assessed similar to revisions.
  - If there were other requisitions or sourcing requests under purchase request 2, then the purchase request is not deleted. Only purchase requisition 2 is deleted.
  - The **Merge** UI action is only available if PR2 and the corresponding lines were created not more than 24 hours after PR1.
- Sourcing required: Upon awarding the sourcing request, a similar annotation is displayed on the header of the sourcing request indicating that this line can be merged with another existing requisition <Purchase requisition number>. The user can select **Merge with Existing Requisition** or **Create Requisition**. If merged, PR1's state reverts to Pending Approval.

Scenario 3: PR1 for Supplier A exists, in state Final Review. PO does not exist yet. Same as Scenario 2.

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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. The flow designer uses the underlying task and case generation decision tables, and purchasing tasks and procurement cases are created based on the conditions defined in the decision tables.

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Conditions and triggers for task and case creation

While the **Sourcing decision dependent on case** and **Order dependent on case** fields in the Finance 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 Finance 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
- Sourcing Event Task and Case Generation Rule

Procurement case types

Here's a list of the types and subtypes of procurement cases:

- Edit a purchase
- Edit a receipt
- GL Coding Review
- Budget Review
- Contract Review
- Send NDA for Signature
- Return a purchase
- Replace a purchase
- Request a Corporate Card
- Inquiry
- Delivery Address Review
- Request a copy of contract
- Due Diligence

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 states that are available for a procurement case are listed.

- Draft
- Processing Case
- In Review
- On Hold
- Work in Progress
- Closed Canceled
- Closed Rejected

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- Closed Completed
- Awaiting Acceptance

When the condition in the **Enable case resolution acceptance** decision table is set to **True**, the procurement case state automatically changes to **Awaiting Acceptance** after the fulfiller sets it to **Closed Completed**.

The requestor gets an email notification to accept or reject the resolution within a set time.

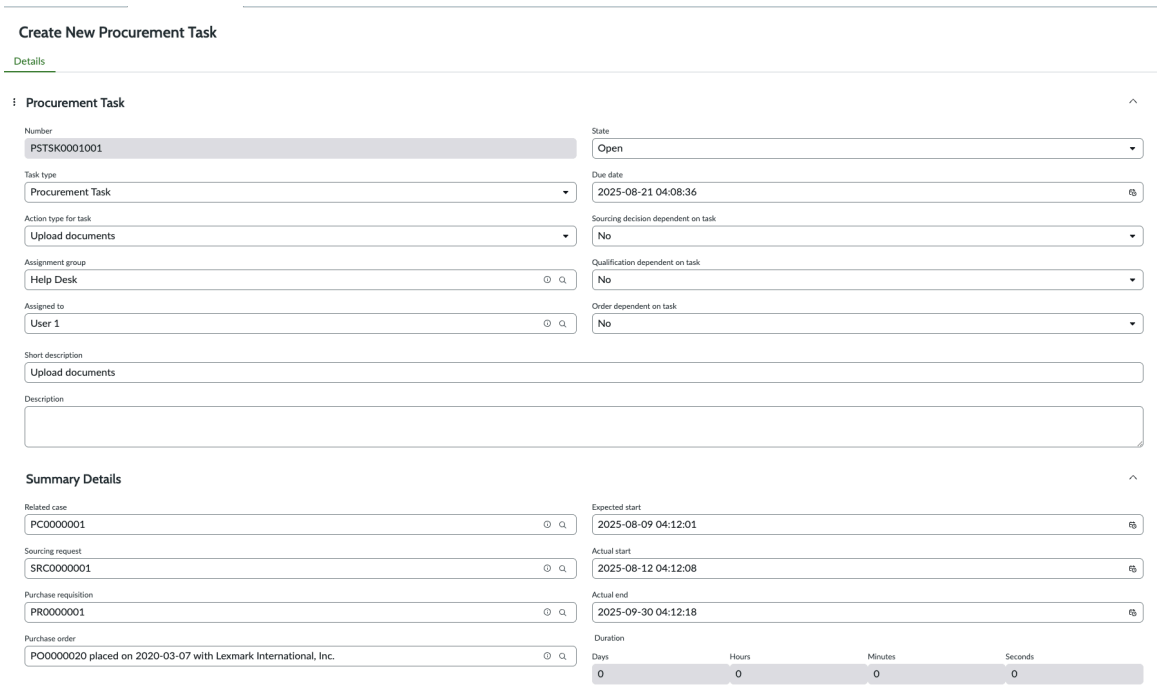
- If the requestor accepts the case resolution, a predefined email is generated for them to send and the case automatically changes to **Closed Completed**.
- If the requestor rejects the case resolution, the case moves back to **Work in Progress**.
- If the requestor does not respond in time, the case is automatically marked as **Closed Completed**.

For more information on email notifications, see Alerts and email notifications from ShoppingHub.

Purchasing task types

A list of the types and subtypes of purchasing tasks are listed.

- 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.

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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 • 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 the shopper's responses to the procurement specialist's questions.
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 Custom Task for Employee task subtype. 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.

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Purchasing task fields (continued)

Field	Description
Sourcing decision dependent on task	Specifies whether this task must be completed before a sourcing request can be created. **Note:** This field is displayed only if a related sourcing request is entered.
Qualification dependent on task	Specifies whether this task must be completed before a qualification request can be 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. **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.

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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):

- 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 requisition auto-order

Auto-order automates the creation of a purchase order (PO) from an approved purchase requisition (PR) without requiring manual buyer intervention. Two system properties control whether the feature is active and the maximum PR value that qualifies for automatic processing.

When a PR reaches the state where all activities are complete, the Requisition State Handler flow evaluates the auto-order configuration. If the conditions are met, the flow creates a PO and links it back to the PR automatically. If the conditions are not met, the PR waits for a buyer to create the PO manually.

How auto-order works

The Requisition State Handler flow performs the following actions during auto-order processing.

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1. A PR is created and reaches the state where all approval activities are complete.
2. The Requisition State Handler flow evaluates whether auto-order is active and whether the PR total is at or below the configured threshold.
3. If the auto-order conditions are met, the flow invokes the `CreatePurchaseOrder` script, which validates the PR and builds the PO header and lines from the approved PR lines.
4. The PO state is set based on the supplier type:
   - For standard suppliers, the PO state is set to **Pending submission**.
   - For punchout suppliers, an integration request is sent to the supplier and the PO state is set to **Pending supplier confirmation**.
5. The PO is linked to the PR, and the PR state is updated to reflect the PO state.

If PR validation fails during PO creation, any partially created PO records are removed and the PR must be handled manually.

Auto-order system properties

The system properties that control auto-order behavior are described in the following table.

Auto-order system properties

Property	Description	Default value
sn_shop.spend.requisition.autoorder	Controls whether auto-order is active. Set to `yes` to turn on automatic PO creation. Any other value, including `no`, turns off auto-order and requires a buyer to create the PO manually. If no value is configured, the system treats it as `yes`.	`no`
sn_shop.spend.requisition.autoorder.threshold	Sets the maximum PR total, in reference currency, that qualifies for auto-order. PRs with a total above this value require manual PO creation. Set to `0` to apply auto-order to PRs of any amount. If no value is configured, the	`0`

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Auto-order system properties (continued)

Property	Description	Default value
	system treats it as 0.	

Note:

The threshold is compared against the PR's reference currency amount. In multi-currency instances, configure the threshold value with the instance reference currency in mind to help avoid unexpected results for PRs entered in other currencies.

Auto-order requirements

All of the following conditions must be true for auto-order to create a PO:

- The *sn_shop.spend.requisition.autoorder* property is set to `yes` or has no configured value.
- The PR total in reference currency is at or below the configured threshold, or the threshold is set to 0.
- The PR has at least one line in an approved state.
- All approved PR lines have valid cost allocation data, including GL account information.

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**.
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.
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.

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Purchase order fields (continued)

Field	Description
	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:

  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.

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- 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. 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.

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Purchase order related lists (continued)

Related list	Description
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.

For a list of all purchase order states and the conditions that trigger each state change, see Purchase requisition, purchase order, and sourcing request states.

Blanket purchase order workflow

During checkout, when a shopper selects **I am not sure** in the delivery date option, it creates a purchase requisition with a blanket order type, which results in the creation of a blanket purchase order.

Purchasing permissions define the list of users, groups, cost centers, or departments that are allowed to purchase against the blanket purchase order without requiring any approvals. As receipts and invoices are not applicable for blanket purchase orders, these related lists are not displayed on the purchase order form view.

For details on the various fields and related lists that are populated for a blanket purchase order, see Purchase order.

Standard purchases against a blanket purchase order

A standard purchase order release is created when the following conditions are satisfied:

- User who requested the purchase is defined under the associated purchasing permission of the blanket purchase order.

  The business owner who requested the original blanket purchase order can always release against the blanket purchase order even if they are not explicitly defined under the purchasing permission.

- Creation date of the standard purchase line falls within the range of the blanket line's start and end date.
- Supplier product purchased is defined as a supplier product on the blanket purchase order.
- Funds must be available on the blanket purchase order. The value of the **Released amount** field on the blanket purchase order must be less than the value in the **Total amount** field.

The standard purchase order release has a reference to the blanket purchase order and will be displayed under the Purchase Order Releases related list on the blanket purchase order.

On the blanket purchase order, the sum of the total amount of all released purchase orders is updated in the **Released amount** field of the Summary Details section. When the value of the **Released amount** field matches with the value of the **Total amount** field, the status of the blanket purchase order changes to **Closed Complete**.

If a purchase order release amount results in the blanket purchase order amount being exceeded, an approval is triggered for the delta amount to the business owner of the applicable standard purchase order release.

For example, if a blanket purchase order exists with an associated purchasing agreement contract with validity from January 1, 2019 to December 31, 2019. The amount limit on the blanket

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purchase order is $1000, and the current released amount is $800. The next standard purchase order release against the blanket is for $500. So, an approval for the delta of $300 is required.

To check if a request should be considered as a release against an existing blanket purchase order:

- For goods, check the creation date of the purchase request against the start and end date of the corresponding line on the blanket purchase order.
- For services, check the start and end date of the request against the start and end date of the corresponding line on the blanket purchase order.

Purchase revisions

Revisions for the quantity of the product, budget, or delivery location can be made to orders placed from ShoppingHub.

The shopper can revise an order from ShoppingHub or the procurement specialist can submit revision from the 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.

Purchase order revisions

- Shopper-initiated purchase order revision:
  - When the status of a purchase order is not **Closed Complete** or **Closed Canceled**, a shopper can revise the lines from ShoppingHub. A revision request is created and assigned to the procurement specialist, and the state is updated to **Closed Complete**. A procurement specialist does not have to confirm the revision request prior to creation of the revised purchase requisition.
  - A new purchase requisition of type **Revision** is created and the revision request is attached to the revised purchase requisition.
- Procurement specialist-initiated purchase order revision:

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- 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 ShoppingHub. Only the quantity and budget can be revised on a blanket purchase order.
  - When a budget revision is made, the quantity and total line amount of the corresponding blanket line is calculated to the nearest value using the negotiated unit cost of the supplier product. Revisions cannot be below the current released amount against the blanket purchase order. Revising either quantity or budget results in the other being back-calculated accordingly.
  - On confirmation of the revision, a new purchase requisition of type **Revision** is created and the revision request is attached to the revised purchase requisition.

For both the shopper-initiated and procurement specialist-initiated purchase order and blanket purchase order revisions, the status of the purchase requisition is updated to **Pending Revision** and delegation of authority is reassessed.

The state of the purchase order and the purchase order lines that were revised are updated to **Pending Revision**. The state of the purchase order lines which are not revised does not change.

When the state of the purchase requisition is **Final Review** and the purchase requisition is of the type **Revision**, you can select **Update Purchase Order** to update the existing purchase order and purchase order lines with the revised information.

State of the purchase requisition is then updated to **Closed Complete**.

Note:

Revision requests must be in a closed state for a purchase order to be created. For more information on purchase orders, see Purchase order.

Revisions are not allowed in ShoppingHub for lines that have been fully received. Revisions can only be triggered for an amount that exceeds the received amount.

Impact of rejecting an increase in funds revision

If a purchase requisition or purchase order is revised, and the re-approval is rejected, the behavior is as follows:

- If a purchase order doesn't exist, the purchase requisition is reverted to the pre-revision state and value, for both single and multiple lines.
- If a purchase order exists, and the good or service has either been partially delivered or not delivered at all:

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- For a single line, the original purchase order remains as-is. The purchase order reverts to its state prior to revision. The resulting purchase requisition of type Revision will be in the Closed Rejected state, with no option to update the purchase order.
- For multiple lines, if every line within the revision purchase requisition is rejected, the impact is the same as above.
- For multiple lines, if some of the lines within the revision purchase requisition are rejected, only those rejected lines revert to their state prior to revision, upon updating the purchase order.

Purchase revision impact on cost allocations and milestones

Cost allocation behavior

- Cost allocations from the original purchase requisition are updated in the revised purchase requisition.
- If an increase or decrease in funds happens, a new cost allocation is created for the primary cost center (cost center of the business owner on the purchase requisition) on the revised purchase requisition.

  This amount reflects either as an increase (positive amount) or decrease (negative amount) in funds.
- Once the purchase order is updated, the revised purchase order contains separate entries for the primary cost center, that is, the one from the original purchase requisition and another as a result of the revision, along with any additional user-defined allocations from the original purchase requisition.
- Cost allocations cannot be updated after the creation of a purchase order.

For more details on cost allocations, see Cost allocations.

Milestone behavior

- Milestone details are copied from the original purchase requisition to the revised purchase requisition.
- User can create any additional milestones, as needed, on completion of the revision.
- Once the purchase order is updated, the original milestone on the purchase order is updated to the **Closed Canceled** state, as a copy is already created during the revision process.

For more details on milestones, see Milestones.

Related topics

Purchase revision flows

Contracts

A contract defines the terms and conditions along with pricing agreed for a product with the supplier. An active contractual price determines if the pricing of a product or service is displayed on ShoppingHub.

Use the purchasing view to view contract details in the Sourcing and Purchasing Automation module. You can also create a new contract with the contract_manager role.

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In addition to purchase requisitions, systematic creation of a contract occurs during a sourcing request or negotiation. This is configured accordingly in flow designer. The various scenarios for pre-purchase contract creation are:

- Negotiation exists, created manually: Trigger contract creation, including NDA if required, against the negotiation when the state of the negotiation is Planned.
- Negotiation exists, created systematically through third-party sourcing integration: Trigger contract creation, including NDA if required, against the negotiation when the state of the negotiation is Negotiation in Progress.
- Negotiation does not exist: Trigger NDA contract creation, if required, against the sourcing request when the state of the sourcing request is Awaiting Supplier Response. A procurement specialist or contract team can manually create other contracts against the sourcing request before creating a purchase requisition. If contracts are not manually created against the sourcing request, they are systematically created against the awarded purchase requisition after approvals are complete.
- New supplier created from manual sourcing or third-party sourcing integration: For third-party sourcing integration, trigger contract creation when a new purchase line is created for a new supplier. For manual sourcing, contract creation follows the manual negotiation creation or negotiation does not exist scenarios.

When a supplier is awarded, contracts that were created for the other suppliers are canceled, except NDAs. Contract metadata population remain as is.

In a contract, the following are the key fields:

Contract form

Field	Description
Contract model	Type of the contract.
Supplier	Supplier that is billed for this contract.
Contract number	Unique identifier for the contract that the vendor assigns.
Name	Short description of the contract.
Parent contract	Parent contract or agreement, if any.
Start date	Date from which this contract is effective.
End date	Date on which the contract ceases to be effective.
State	Status of the contract. For example, **Draft**, **Active**, **Expired**, or **Canceled**.
Substate	Substate of the contract. For example, **Awaiting Review**, **Under Review**, **Approved**, or **Rejected**.
License quantity entitled	Number of licenses included in the contract. This field is available for Maintenance and Software License contracts.
Contract administrator	Person responsible for managing the contract and interacting with the vendor.
Approver	User who approves or rejects the contract.

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Contract form (continued)

Field	Description
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.
Renewal	
Automatically renew	Indicates if the contract can be renewed at the end of its term.

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Contract form (continued)

Field	Description
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.
Purchase Requisitions	Lists all the purchase requisitions associated with this contract.

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Contract related lists (continued)

Related list	Description
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.
- One-time price break, no negotiations:

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- 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.

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.

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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 lines referenced in receipt task

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.

Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you.

For a product of the type service, if the acknowledgment type is **Milestones**, then confirming a milestone also results in receipt generation. However, if the acknowledgment type is **Two way match**, receipt creation is disabled for this purchase order line.

Receipts can either be a partial or full receipt, and are used determine the status of the associated purchase order line and purchase order.

You can view all receipts from the **Receipt Acknowledgment** sub-module under the 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.

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Receipt fields (continued)

Field	Description
Type	Type of the receipt based on the product type. For example, **Goods Receipt** or **Services Receipt**.
Summary Details	
Purchase order line	The purchase order against which the receipt of the product is acknowledged.
Milestone	Milestone associated for this receipt. This field is visible only for a services receipt and if the acknowledgment type is milestones.
Quantity received	The quantity of the product received. This field is visible only for a good receipt.
Percentage received	Percentage of the service received. This field is visible only for a services receipt.
Amount received	Receipt amount for the service received. This field is visible only for a services receipt.

Shipment details

Shipment details display tracking information of a product that is shipped to the employee shopper.

Shipments can be tracked for USPS, FedEx, UPS, or other carrier services. The tracking information from shipping details is displayed to the employee shopper on the ShoppingHub portal. Shipment details are referenced to a receipt task and a purchase order line.

You can view all shipment details from the **Receipt Acknowledgment** sub-module under the 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.

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Shipment details fields (continued)

Field	Description
	For example, **USPS**, **FedEx**, **UPS**, or **Other**.
Other carrier	Name of any other shipment carrier used for the delivery. This field is visible only if carrier is selected as **Other**.
Receipt task	Receipt task associated with the shipment.
Receipt	Receipt associated with the shipment.
Purchase order line	Purchase order line associated with the shipment.

When the status of the shipment is updated to **Delivered**, a receipt is created for the quantity mentioned in the shipment.

Invoice tasks

Invoice tasks, an extension of acknowledgment tasks, lists invoice tasks in the Open, Work in Progress, and Closed Rejected status.

Note: If you are a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, these tasks aren't applicable for you. However, if you choose to continue with the existing Source-to-Pay Common Architecture (sn_shop) plugin and skip the Shopping Hub plugin, these tasks are available for you to work on.

When an invoice acknowledgment is triggered, a task is created against the invoice and displayed as an Invoice Task related list on the Invoice form view.

You can view these invoice tasks from the **Receipt Acknowledgment** sub-module under the 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.

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Invoice task fields (continued)

Field	Description
State	Status of the invoice task. The options are **Open**, **Work in Progress**, **Closed Complete**, **Closed Rejected**, and **Closed Canceled**. If a line is acknowledged in ShoppingHub, the state of the invoice line will be Invoice Confirmed. If rejected, the state of the invoice line will be Rejected.
Due date	Expected due date from the person to whom this task is assigned.
Summary Details	
Invoice	Invoice for which this invoice task is created.
Expected start	Expected start date of the invoice task.
Actual start	Actual start date of the invoice task.
Actual end	Actual end date of the invoice task.
Duration	Duration to complete this invoice task.

The following are the related lists of an invoice task:

Invoice task related lists

Related list	Description
Invoice lines	List of all the related invoice lines with acknowledgment type as service acknowledgment, for this invoice task.

Invoices

Invoices are generated for a payment against a purchase order. A purchase order can have multiple invoices depending on the payment schedule.

You can manually create invoices in the ServiceNow platform or generate invoices through integration with an external supplier portal.

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.

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Invoice fields (continued)

Field	Description
	This field is applicable when there's an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration.
Status	Current status of the invoice.
Supplier invoice number	Invoice number of the supplier. **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. **Note:** This is a mandatory field except when the invoice is in the Draft state. This is also an editable field.

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Invoice fields (continued)

Field	Description
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 ShoppingHub. For details, see Shopper to-dos.
Invoice Tasks	When a service acknowledgment is triggered, a task is created against the invoice and listed here. **Note:** If you are a new customer, or an existing customer who has upgraded and installed the Shopping Hub plugin, these tasks aren't applicable for you. However, if you choose to continue with the existing Source-to-Pay Common Architecture plugin and skip the Shopping Hub plugin, these tasks are available for you to work on.

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

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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.

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

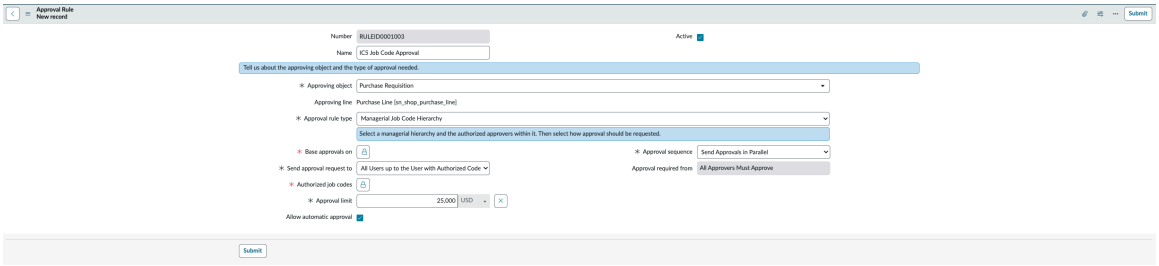
To create an approval rule, you must have set up your product catalog (with the necessary product categories, product models, and supplier products) and should be able to raise a purchase requisition or sourcing request. For more information on how to set up your product catalog, see Create a product 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.

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Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Administration** > **Approval Rule**.
2. Select **New**.
3. On the form, fill in the fields.

Approval Rule form

Field	Description
Number	System-generated unique identifier for the approval rule.
Name	Name you assign to the approval rule.
Active	Option to decide if this rule is used to generate approvals during the purchase requisition process.
Approving object	Object you're seeking approval for. The following options are available: ○ 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

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Field	Description
	○ 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.
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

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Field	Description
	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**.

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.

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Approval rule types (continued)

Approval rule type	Description	Example Scenario
		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 be parallel or sequential, and the approval decision method can be all approvers or any approver.	If approval is required from all managers in hierarchy, then an approval is sent to all users in the purchasing user's (business owner) management hierarchy up to the job code specified, when the approval trigger conditions are met. 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.

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Approval rule types (continued)

Approval rule type	Description	Example Scenario
		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 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.

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Foreign exchange and reference currency considerations in approval rules

If an approval rule has a defined approved purchasing limit, the foreign exchange currency is defaulted to the system reference currency.

To determine the approval rule to be triggered, compare the transactional currency on the **Total amount** field on the purchase requisition against the reference currency approval rule bucket that it belongs to.

If an approval rule has an approval trigger defined using the total line amount, it should be defined by dot-walking to the reference amount. The transactional currency on the purchase line's total line amount is compared against the reference currency, to determine the approval rule to be triggered.

Fully received lines consideration in approval rules

For a fully received line, the line amount is taken into consideration to determine the approval rule that needs to be triggered.

Approval rule grouping and sequencing

As a Procurement Administrator, you can associate approval rules with approval groups and define the sequence to determine when these rules should be triggered. With this association, a set of approval rules within a rule group is triggered in sequence, instead of all of them being evaluated simultaneously.

For example, when purchasing an IT-related product, a manager can first approve the purchase before sending it to the IT department for approval.

Rules within an approval group are evaluated only if all the rules within it are satisfied. If there are multiple approval groups, all groups are evaluated simultaneously. For approval rules that do not have an associated approval group, evaluation is done as-is at the same time with rules that are associated to approval groups. By default, all rules in an approval group are also evaluated independently. If a rule group is satisfied, then the individual rules do not need to be evaluated. This prevents a Procurement Administrator from creating duplicate rules that need to be evaluated independently and also within the context of an approval group.

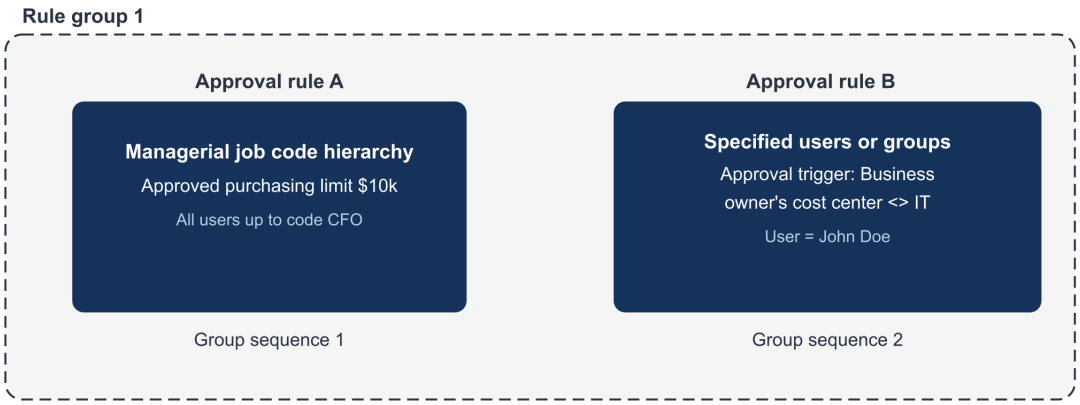
Consider the following scenarios:

Scenario 1

- Purchase requisition amount is $8,000
- Business owner’s job code is IC3, cost center is Engineering
- Business owner’s managerial job code hierarchy is IC3 => M3 => M4 => CFO

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Approval rules A and B

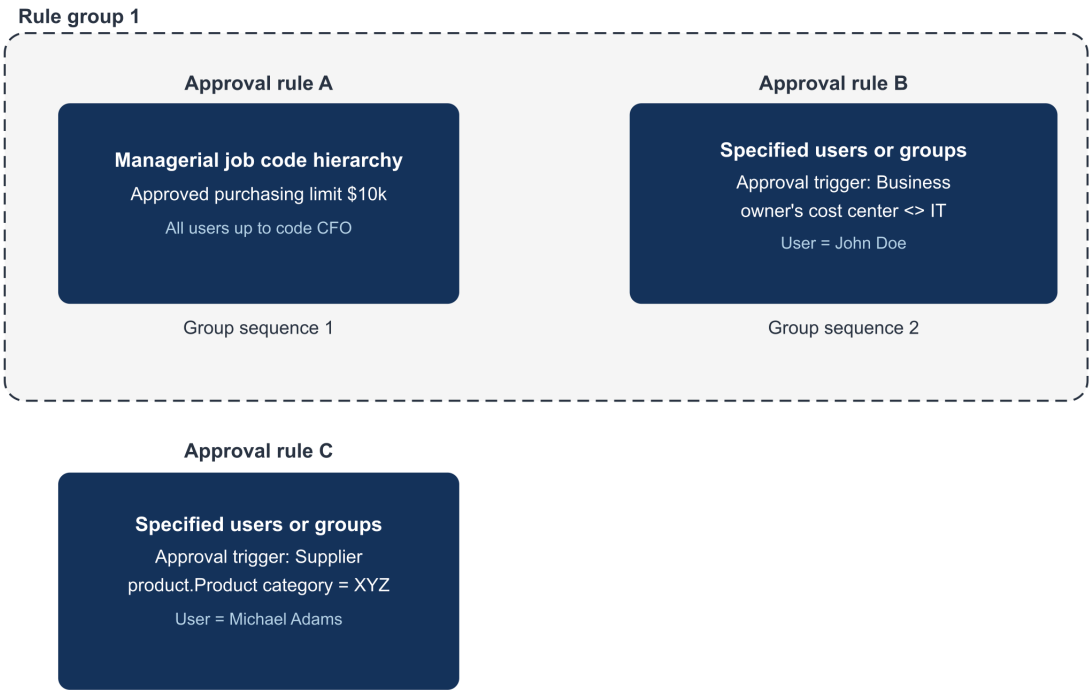


- Without rule group and group sequencing, approval rules A and B are triggered simultaneously.
- With rule group and group sequencing, approval rule A is triggered first, followed by approval rule B when A is complete.

Scenario 2

- Purchase requisition amount is $8,000, supplier product belongs to the XYZ product category
- Business owner's job code is IC3, cost center is Engineering
- Business owner's managerial job code hierarchy is IC3 => M3 => M4 => CFO

Approval rules A, B, and C

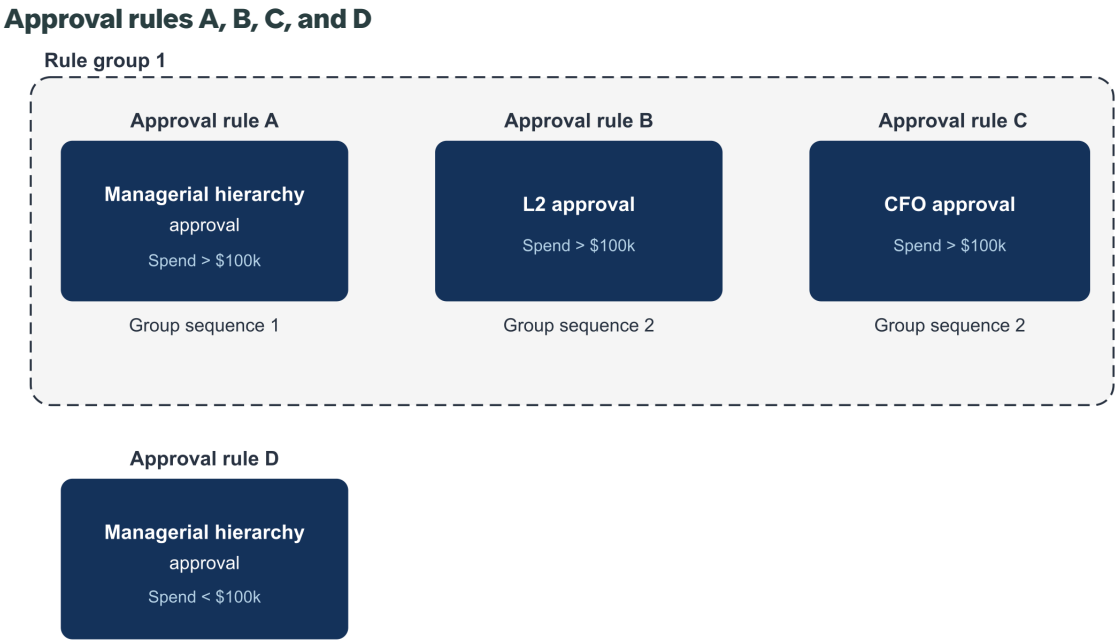


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- Without rule group and group sequencing, approval rules A, B, and C are triggered simultaneously.
- With rule group and group sequencing, approval rules A and C are triggered first, followed by approval rule B when A is complete.

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.

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:

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- 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.
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.

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Field	Description
Approval decision method	Method of approving the rule. You can select if all approvers must approve the rule or any approval can approve it.
Approval	Status of the approval plan request. The options are Not Yet Requested, Requested, Approved, and Rejected.
State	Work status on the requested approval plan. The options are Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped.
Purchase requisition line(s)	List of the purchase lines that the approval is planned for.
Primary contact	Business owner of the purchase who can be contacted with questions about the purchase. This field is automatically populated on creation of an approval plan with the referenced business owner of the purchase order.
Short description	Short description of the approval plan. This is a calculated value, in the format: Approve <total amount> purchase for <supplier name>.

What to do next

Use the related lists of the approval plan form to view the approval plan details and approvers associated with this approval plan.

Approvals reassessment

Review the conditions for approvals reassessment and their impact on purchase automation.

Resend approvals for reassessment property

The sn_shop.approval.reassessment.resend purchasing property determines if an approval needs to be reassessed as a result of a revision or a merge. The revision could be that of a purchase order or a purchase requisition. This property is only applicable if the same approval rule is triggered. If a new rule is triggered, this property is not applicable and a new approval plan is generated.

For information on approval rule groups and sequencing, and how these impact the property, see Approval rule grouping and sequencing.

A reduction in funds revision is not allowed if the amount is below what has already been shipped or delivered. Revisions are not allowed on rejected lines, and therefore reassessment of approvals is not applicable.

For information on approval rules, see Approval rule types and Create an approval rule.

When an approval reassessment is sent to approvers, the approval amount to be considered must include the revised line's original amount and the increase in funds. For example, if the original line amount is $1000 and an increase in funds revision results in the line amount to be $1500, the amount to be considered for reassessment and approval is $1500.

When the resend approvals for assessment property is set to Yes, if there is an existing approval plan record that is in progress, and a revision or merge occurs before the plan is completed, its status is updated to No longer required, and a new plan is created. If the property is set to No, and if the existing approval plan is in progress, it is reused.

During an approval reassessment, rejection of a fully received line is not allowed. In ShoppingHub, the fully received line is displayed under the **Approved** tab.

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Population of due date on approvals

When a new approval record is generated and the state of the approval record is Requested, the due date for the record is calculated and populated using the following properties:

- sn_shop.pr.approval.duration: Duration, in hours, allocated for an approver to complete the approval request. By default, it is set to 9 hours.
- sn_shop.pr.approval.duration.schedule: The type of schedule associated to the approval duration. By default, it is set to 8-5 weekdays, excluding holidays.

Note: The sys_id of the schedule is used as the value for this property.

Parallel approval records have the same due date. For sequential approvals, the first approver's due date is populated based on the property value defined, the second approver's due date is calculated after the first approval is complete, and so on.

Creation of breached approvals review task

If a due date for an approval is breached, a new task is automatically created using the [PSM] Approval Due Date Breached scheduled job, which runs once a day. This task is a purchasing task, with subtype Approval, and is assigned to the same person to whom the purchase requisition is assigned.

For sequential approval, this purchasing task is created for each approver record that is overdue. For parallel approvals, a single task is created with a related list displaying all the relevant approver records that have breached.

The due date of this task is populated with the breach time on the SLA instance record associated to the SLA definition for the breached approvals review.

For approvals that are no longer required or are canceled, the breached approvals review task creation is not triggered. Breached approvals review SLAs are deleted as they are no longer required.

Create a purchasing assignment rule

Automatically assign a sourcing request, negotiation, or purchase requisition to a procurement specialist user or a task fulfiller's group based on pre-defined conditions by using a purchasing assignment rule.

Before you begin

To create a purchasing assignment rule, you must have set up your product catalog (with the necessary product categories, product models, and supplier products) and should be able to raise a purchase request. For more information on how to set up your product catalog, see Create a product category, Create a product model, and Add a supplier product. You should have also set up user attributes on the sys_user record appropriately.

Role required: sn_shop.procurement_administrator

About this task

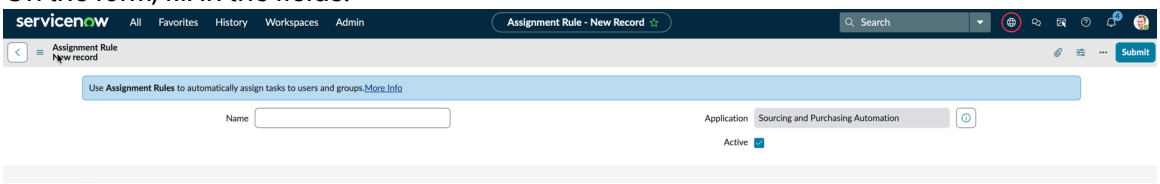
You can create a purchasing assignment rule to route sourcing requests, negotiations, or purchase requisitions to an individual or group, from the Sourcing and Purchasing Automation module.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Administration** > **Purchasing Assignment Rules**.
2. Select **New**.

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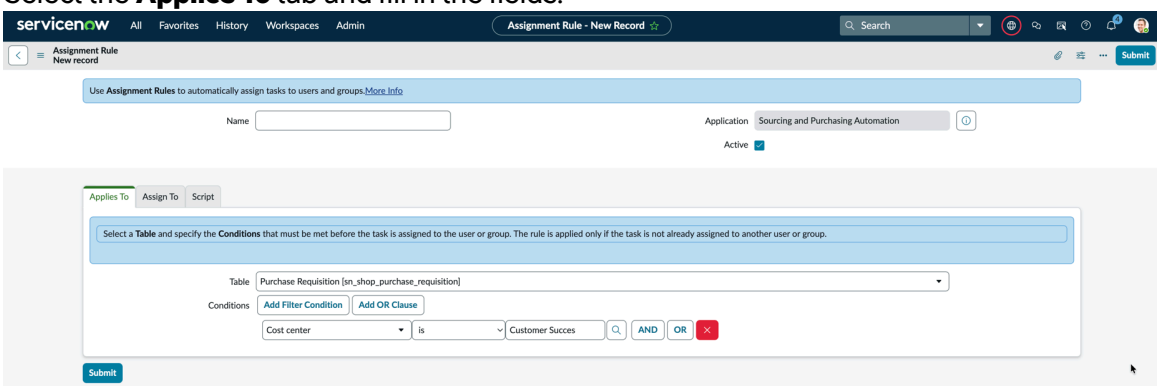
3. On the form, fill in the fields.



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.

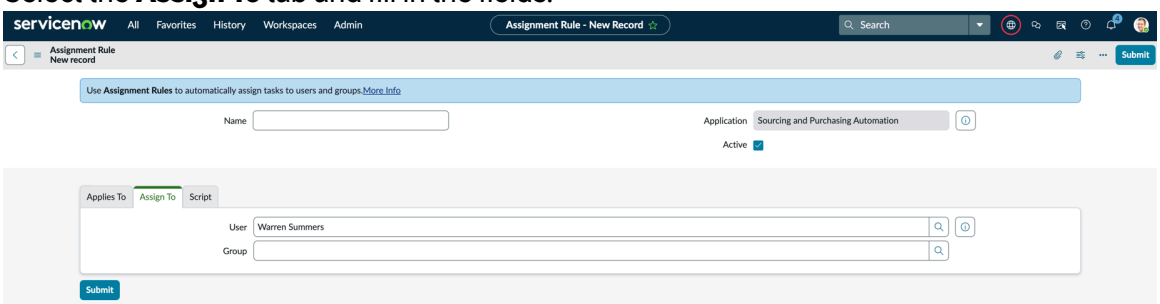
4. Select the **Applies To** tab and fill in the fields.



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.

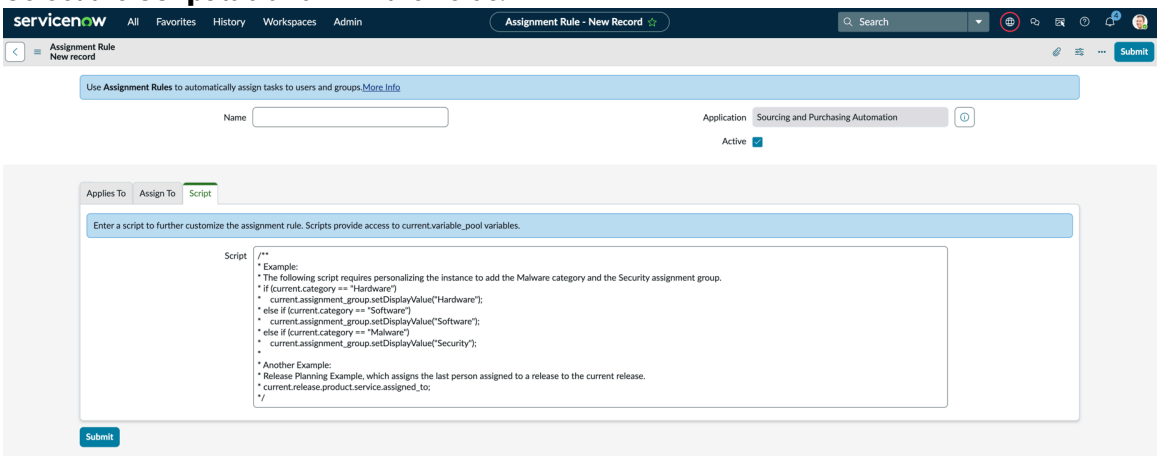


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Assign To form

Field	Description
User	The user to whom the task is assigned.
Group	The group to which the task is assigned.

6. Select the **Script** tab and fill in the fields.



Script form

Field	Description
Script	A script to further customize the assignment rule. Scripts provide access to the current pool of variables.

7. Select **Submit**.

Define a capitalization policy

Create fixed asset shells automatically during purchase order creation, by defining a capitalization policy.

Before you begin

Role required: sn_shop.procurement_administrator

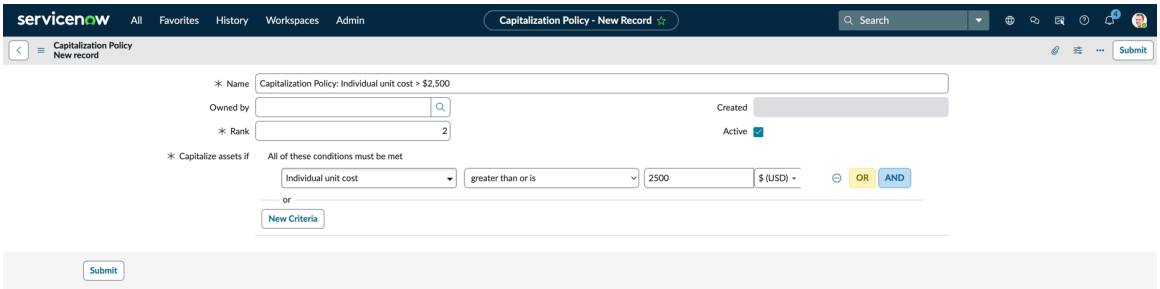
About this task

You can define a capitalization policy from the 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.

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Capitalization Policy form

Field	Description
Name	The display name of the capitalization policy.
Owned by	The user responsible for managing this fixed asset policy.
Rank	Determines the order in which a capitalization policy is processed if multiple policies are satisfied. Policies with lower ranks are honored and processed first.
Created	The date when this fixed asset policy is created.
Active	Option to decide if this policy can be used to create fixed assets.
Capitalize assets if	Conditions that determine the creation of a fixed asset.

4. Select **Submit**.

Fixed asset creation

As a procurement administrator, you can create fixed assets for products that are purchased for long-term use and are not likely to be converted quickly into cash.

Fixed asset creation is automated when capitalization policy criteria are satisfied. To ensure that fixed assets are created automatically on creation of a purchase order, you must first define an applicable capitalization policy. For more information on how to define a capitalization policy, see Define a capitalization policy.

Note: Blanket purchase orders cannot result in the creation of a fixed asset.

You can navigate to **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.

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Fixed Asset form (continued)

Field	Description
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:

- 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.

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Purchasing form

Field	Description
Purchase order	Purchase order associated with this asset.
ERP number	Unique number generated within the ERP system for the purchase order.
Purchase order line	Purchase order line associated with the asset.
Supplier	Supplier associated with the asset.
Unit	Unit used to purchase this asset.
Unit price	Unit price of this asset.
Recipient	Recipient of the asset.
Received	Date when the asset was received.

For more information on asset creation, see Create assets.

A fixed asset related list has also been added. It displays the fixed asset that is associated with this inventory asset if a capitalization policy was satisfied.

Shipping cost calculations

A framework to integrate shipping cost calculations into Sourcing and Purchasing Automation is implemented such that approvals can be done on the full value of purchases.

Shipping estimates can be provided by both the ShoppingHub administrator and the buyer.

Shipping estimates from ShoppingHub administrator

A ShoppingHub administrator can set a default system-wide shipping estimate as a percentage. This can then be applied to all purchases that require shipping, when no other shipping estimates or data exist. This is enabled through a system property sn_shop.default.shipping.estimate. Organizations that have a policy around an acceptable threshold shipping cost might want to enter the threshold in the sn_shop.default.shipping.estimate.

A ShoppingHub administrator can also configure shipping estimates to be included in purchase requests for the approval process. This is enabled through a system property sn_shop.shipping.estimate.inclusion, which is included in purchase request approvals. If this inclusion is marked as true, the shipping estimate from the cart line or checkout is included as a field in the purchase line and in the total amount in the purchase request, while the estimate in cost allocation is not considered. However, if this inclusion is marked as false, not only would shipping be excluded in the purchase request approval process, but also not calculated at checkout, even if data is included at the product, supplier, or system levels.

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

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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].
3. If both 1 and 2 are null, use the default shipping estimate percentage to calculate shipping, provided the sn_shop.shipping.estimate.inclusion property is set to true:
   - Pull the estimated shipping as percentage value from the system properties.
   - Calculate shipping as [Estimated Shipping as Percentage] * [Quantity] * [Negotiated Unit Price].
4. If 1, 2, and 3 are all null, or the sn_shop.shipping.estimate.inclusion property is set to false, shipping estimate is shown as Undetermined.

Tax calculations

A framework to integrate tax calculations into Sourcing and Purchasing Automation is implemented such that approvals can be done on the full value of purchases.

Tax estimates from ShoppingHub administrator

A ShoppingHub administrator can configure tax estimates to be included in purchase requests for the approval process. This is enabled through a system property sn_shop.tax.estimate.inclusion, which is included in purchase request approvals. If this inclusion is marked as true, the tax estimate from the cart line or checkout is included as a field in the purchase line and in the total line amount. However, if this inclusion is marked as false, not only would tax be excluded in the purchase request approval process, but also not calculated at

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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:

- 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

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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 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.

Installed plugins

Install Procurement Case Management from the ServiceNow Store.

The Procurement Case Management (sn_spend_psd) application installs the following dependent plugins:

- Common Service Delivery (sn_spend_sdc)
- Source-to-Pay Workspace (sn_spend_workspace)

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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 manage application-level configurations, roles, and access controls. 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 users with the system-level admin role to help prevent system-level admins from viewing sensitive application data via forms, lists, and the UI. 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

Procurement case types

Procurement case types classify and route procurement work items to the appropriate team, and can block order or sourcing processing until the required review or action is complete.

What procurement case types do

Each procurement case in Procurement Case Management (PCM) carries a case type that determines its purpose, the team that handles it, and its effect on the associated purchase order or sourcing activity. When a case is open, the case type controls whether the purchase order or sourcing process can advance or must wait until the case is resolved.

Procurement Case Management provides 13 base system case types covering purchase modifications, compliance reviews, and employee support requests. Each case type follows a defined workflow, and some are handled through guided playbooks that walk fulfillers through the required activities.

Case type categories

The 13 base system case types fall into three categories based on who initiates them and what they are used for.

Procurement case type categories

Category	Case type	Purpose
Purchase modification	Edit a purchase	Modify an existing purchase requisition or purchase order — for example, to change quantity, price, or delivery date.

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Procurement case type categories (continued)

Category	Case type	Purpose
	Return a purchase	Return received goods to the supplier.
	Replace a purchase	Replace damaged, incorrect, or defective goods.
	Edit a receipt	Correct a receiving record after goods have been received.
Compliance review	GL Coding Review	Verify and correct the general ledger account coding on a purchase line before the order is placed.
	Budget Review	Confirm that sufficient budget exists for the purchase.
	Contract Review	Review applicable contracts before the purchase proceeds.
	Send NDA for Signature	Send a non-disclosure agreement to the supplier associated with the purchase.
	Delivery Address Review	Verify and approve the delivery address for a purchase before the order proceeds.
	Due Diligence	Conduct a supplier due diligence assessment before a purchase proceeds.
Support request	Inquiry	Ask a general procurement question or request support from the procurement team.
	Request a Corporate Card	Request a corporate purchasing card for business expenses.
	Request a copy of contract	Obtain a copy of an existing supplier contract for reference.

How it works

When a procurement event occurs — such as a purchase requisition submission, a Shopping Hub action, or an employee catalog request — the system creates a procurement case on the `sn_spend_psd_procurement_request` table and stamps the appropriate case type.

The following describes how a procurement case moves through its lifecycle:

1. A case is created, either automatically by the system or manually by a user, with a specific case type that determines the workflow and the assignment group.
2. If the case type is configured to block processing, the associated purchase order or sourcing activity is placed on hold until the case is closed. Compliance review cases — such as GL Coding Review and Budget Review — commonly use this behavior.
3. The assigned group works through the required activities. For playbook-driven case types, a guided playbook presents the fulfiller with structured activities and decision points.
4. When the fulfiller resolves the case, any blocking flag is released and the purchase order or sourcing activity can continue.

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Order and sourcing blocking

Some case types prevent a purchase order or sourcing activity from advancing while the case is open. Two independent flags on the case record control this behavior:

- Order dependent on case: The purchase order step in the procurement workflow cannot advance until the case is closed. GL Coding Review, Budget Review, Contract Review, Send NDA for Signature, and Delivery Address Review all set this flag by default.
- Sourcing dependent on case: The sourcing and negotiation step cannot advance until the case is closed. Budget Review sets this flag by default.

The blocking is enforced by the Procurement Operations Platform work item and step framework. When a purchase order or procurement request is viewed, the framework evaluates whether any open cases with blocking flags are associated with that record. While a blocking case remains open, the relevant step, such as the Reviewed step for order-dependent cases or the Negotiated step for sourcing-dependent cases, displays as in progress with the open case shown as a work item that must be resolved. The step cannot advance to complete while the case is active.

The hold releases automatically. When the blocking case is closed, the next time the purchase order or sourcing record is viewed, the framework re-evaluates the step and advances it to complete if no other blocking cases remain open.

Note: If you cancel a purchase order or purchase requisition that has open procurement cases, the system displays a warning and cancels all associated open cases when the cancellation is confirmed.

Related topics

Base system procurement case type reference

Work prioritization

Work prioritization automatically assigns a priority level to purchase requisitions, sourcing requests, and procurement cases so that procurement specialists can work the most urgent items first.

When procurement records arrive in a specialist's queue, they have no automatic signal indicating which items are most urgent. Without prioritization, a minor catalog update and a high-value supplier renegotiation appear identical. Work prioritization solves this by evaluating each record against a set of administrator-defined rules and stamping it with a priority level before a specialist opens it. The result is a work queue that specialists can sort and filter by priority, with the most business-critical records surfaced at the top.

Priority is assigned automatically. Specialists and requesters do not set it manually. Administrators control the rules that determine how priority is calculated, through decision tables they configure for each record type. For more information about configuring decision table rules to automatically assign priority to purchase requisitions, sourcing requests, and procurement cases, see Configuring work prioritization.

Priority levels

Work prioritization uses a five-level priority scale.

Priority levels

Priority	Value	Description
Critical	1	Highest urgency. Requires immediate attention.

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Priority levels (continued)

Priority	Value	Description
High	2	Significant urgency. Work ahead of routine items.
Moderate	3	Standard urgency. Normal processing timeline.
Low	4	Lower urgency. Can be deferred when higher-priority items are waiting.
Planning	5	System default. Assigned when no configured rule matches the record.

The Planning priority is not a value that administrators configure. It is the fallback assigned to any record that no rule matches. Administrators can roll out work prioritization incrementally — records for which no rules have been written yet receive Planning priority and appear at the bottom of the queue.

Decision table mechanism

Priority rules are defined in decision tables — structured sets of if-then rules where each row specifies one or more conditions and the priority level to assign when those conditions are met. Administrators configure the rules. The system evaluates them automatically whenever a relevant record is created or updated.

There is one decision table per record type.

Decision tables by record type

Decision table	Record type	Default evaluation basis
Priority defaulting for purchase requisitions	Purchase requisitions	Line total amount (financial threshold)
Priority defaulting for sourcing requests	Sourcing requests	Business owner job code (organizational hierarchy)
Priority defaulting for procurement cases	Procurement cases	No default rules — administrators define all conditions

The purchase requisition and sourcing request decision tables include example rules provided as demo data. These rules may not be loaded in production instances and require review before use. The procurement case decision table ships with no rules. Administrators define all conditions from scratch.

How line items drive priority

Purchase requisitions, sourcing requests, and procurement cases can contain multiple line items. Work prioritization evaluates each line item individually and assigns the parent record the highest-urgency result found across all lines.

A single high-priority line item drives the entire parent record to that priority level. For example, if a purchase requisition contains ten lines and one line has a total amount that meets the Critical threshold, the entire requisition is assigned Critical priority, regardless of the other nine lines.

When specialists open a high-priority record, they should expect to find at least one line item that meets a high-priority condition. Other lines on the same record may be routine.

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Lines in a canceled or closed state are excluded from the evaluation and do not contribute to the parent record's priority.

Automatic priority calculation

Priority is calculated automatically in the background whenever a record is created or updated, and whenever one of its line items is created or updated. The calculation runs after the record is saved and does not affect the save operation. The priority field is updated within moments of the triggering event.

Priority is not recalculated for records in a closed or rejected state. After a record reaches a terminal state, its priority is frozen at the value it held at the time of closure.

When a line item is edited; for example, when a line amount is revised, the parent record's priority is recalculated automatically. Specialists do not need to manually refresh or recalculate priority after editing a line.

Fallback behavior

If a record is evaluated and no configured rule matches, the record retains its current priority. For a newly created record, that means it keeps the Planning priority value that the system assigns on creation.

A record with Planning priority indicates that no rule matched — not that an administrator configured it as Planning. It is a signal that the record falls outside the currently defined rules. When the next update to the record or one of its lines triggers a recalculation, the rules are evaluated again. If a matching rule has been added since the last evaluation, the priority updates accordingly.

Work prioritization example

This example shows how an organization might configure work prioritization rules for all three record types, and what happens when records are evaluated against those rules.

A manufacturing organization has deployed the SPO application and is configuring work prioritization for the first time. Their procurement team has agreed on three different criteria, one per record type, that reflect the factors most relevant to their business.

Example configuration

For purchase requisitions, the team prioritizes based on the total value of each line item. Larger-spend lines require faster turnaround and tighter oversight.

Priority defaulting for purchase requisitions — example rules

Rule	Condition	Priority assigned
1	Purchase line total amount is $100,000 or more	Critical
2	Purchase line total amount is between $50,000 and $99,999	High
3	Purchase line total amount is between $25,000 and $49,999	Moderate
4	Purchase line total amount is $24,999 or less	Low

For sourcing requests, the team prioritizes based on the organizational seniority of the business owner. Requests sponsored by senior leaders require faster response.

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Priority defaulting for sourcing requests — example rules

Rule	Condition	Priority assigned
1	Business owner job code is CFO or CEO	Critical
2	Business owner job code is IC4 or above	High
3	Business owner job code is a Manager level	Moderate
4	Business owner job code is IC1, IC2, or IC3	Low

For procurement cases, the team prioritizes based on the type of modification being requested. Supplier changes and contract amendments carry higher organizational risk than routine catalog updates.

Priority defaulting for procurement cases — example rules

Rule	Condition	Priority assigned
1	Case line modification type is Supplier change or Contract amendment	High
2	Case line modification type is Price change	Moderate
3	Case line modification type is Catalog update or Description change	Low

Purchase requisition with mixed line values

A department manager submits a purchase requisition for three items: office furniture ($12,000), a desktop workstation ($8,500), and a conference room display system ($67,000).

When the requisition is saved, the system evaluates each line against the decision table. The furniture line ($12,000) matches Rule 4 and returns Low. The workstation line ($8,500) also matches Rule 4 and returns Low. The display system line ($67,000) matches Rule 2 — its amount falls between $50,000 and $99,999 — and returns High.

The system selects the most urgent result across all three lines: High. The priority field on the purchase requisition is updated to High.

When the requisition appears in the specialist's queue, it is flagged as High — driven by the single large-value line, even though the other two lines were routine in scale. The specialist knows to examine the requisition promptly and will find the $67,000 display system line when they open it.

Sourcing request based on business owner seniority

A sourcing event is created to evaluate suppliers for a new category of raw materials. The business owner on the request holds a job code that corresponds to an IC4-level role.

When the sourcing request is saved, the system evaluates the business owner's job code against the decision table. The IC4 job code matches Rule 2 and the sourcing request receives High priority.

If the same sourcing event had been initiated by a manager-level business owner, the request would have received Moderate priority instead. The same sourcing event, sponsored by a different person, lands differently in the queue — reflecting the organizational importance of who is sponsoring the work.

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Procurement case with mixed modification types

A specialist creates a procurement case to handle updates across three items. Two of the case lines are routine description changes. The third documents a supplier change — a strategic decision with contract implications.

When the case is saved and its lines are evaluated, the two description change lines match Rule 3 and return Low. The supplier change line matches Rule 1 and returns High.

The system selects High as the priority for the parent case. When a manager reviews the team's open work queue, this case appears above the routine catalog-update cases — signaling that it contains at least one strategically significant line.

Record with no matching rule

Before this organization finishes configuring the procurement case decision table, a procurement case is created. The table has no rules yet. The system evaluates the decision table, finds no matching rule, and the case receives Planning priority — the system default. It appears at the bottom of the work queue.

After the rules are configured in the table, the system re-evaluates the case the next time it is created or updated. If a matching rule is found, the priority updates accordingly.

This means work prioritization does not require all rules to be in place before the feature is active. Records created before rules are configured accumulate at Planning priority and are re-evaluated naturally as they are updated.

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.

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- 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 sourcing event.

To initiate the supplier qualification flow on a sourcing request, select the sourcing request you want to work with from the Source-to-Pay Workspace list page, **All team work** > **Sourcing Requests**, and select **Begin qualification**. This automatically creates the qualification cases that you've defined within the decision tables to be associated with this sourcing request, and also moves the sourcing request and its associated purchase lines to the Qualification Needed state. Alternatively, updating the negotiated unit cost on any of the purchase lines within the sourcing request automatically triggers the qualification flow on the sourcing request. Closing the cases moves them to the Qualified state, and readies the sourcing request for awarding.

Note: If a sourcing request is raised with qualified suppliers, qualification cases aren't created and the sourcing request is directly moved to the Qualified state.

When working within a negotiation or sourcing event that has an associated sourcing request, the supplier qualification flow is automatically initiated, and qualification cases are created for the negotiation or sourcing event respectively. Closing these cases moves the sourcing 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 sourcing 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 sourcing event are retained.

Process Automation Designer flows for playbook

The Source-to-Pay 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:

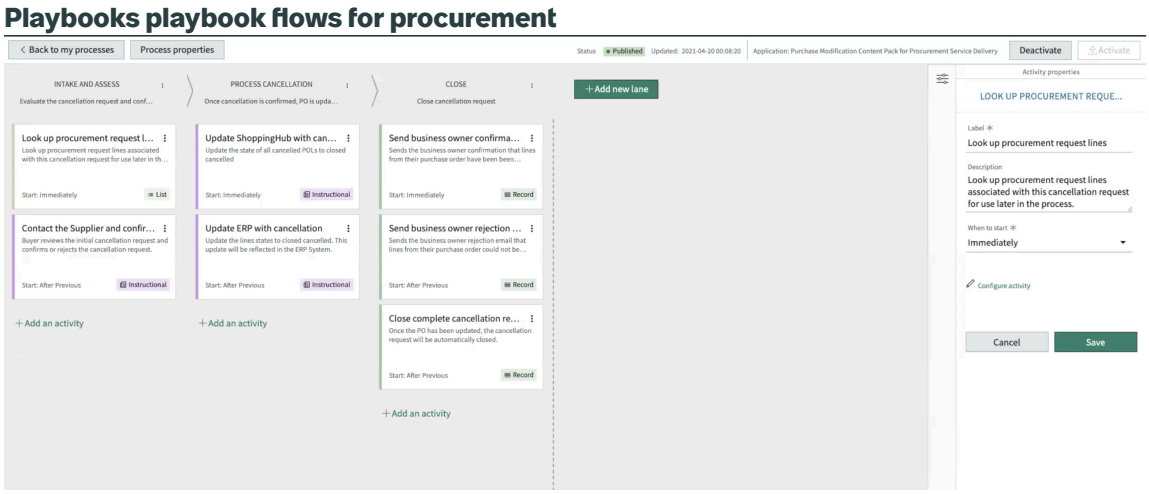
- Optimize the processes and improve the productivity with the help of the procurement workspace playbook.
- Manage easy tracking of the requests and use the guided approval and resolution flows.
- Perform complex activities and tasks from a simplified unified playbook.

Source-to-Pay 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,

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this record defines a set of rules for managing how individual activities appear within the playbook.



You can customize this behavior by customizing the Playbook experience with your own configurations and activity overrides.

Related topics

Playbooks

Email notifications from Playbook

Several email notifications are triggered from Playbook. This may be a result of your action, an assignment for you, or to keep you updated on the status of your purchases, including purchase revisions.

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

- Your request to edit a purchase order or purchase requisition has been confirmed.
- Your request to edit a purchase order or purchase requisition has been rejected.
- Your request to cancel a service request, purchase order, purchase requisition, purchase order line, or purchase requisition line has been confirmed.

Note: You receive one email notification if you cancel from the header level. However, cancellation at line levels triggers respective email notifications.

- Your request to cancel a service request, purchase order, purchase requisition, purchase order line, or purchase requisition line has been rejected.
- Your request to return a product has been confirmed.
- Your request to return a product has been rejected.

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

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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, sourcing events, procurement cases, and tasks. To open the email client, select **Compose Email** from the More Actions icon on the procurement object. A draft email appears with pre-populated data in the **To**, **Subject**, and email body fields.

Using quick messages

In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Messages contextual pane appears in the email client so that you can draft an email with a quick message of your choice. For Sourcing and Procurement Operations, Disclaimer is the only default quick message provided.

On selecting **Insert**, the quick message content is inserted at the place of the cursor. It doesn't replace the content that you created before selecting the quick message. To replace existing content with a quick message, highlight the text to replace and then select a quick message.

Creating quick message content

Define quick messages by creating records in the Email Client Canned Messages [sys_email_canned_message] table.

When you define a quick message, you can add any of the following types of content into the message body:

- Icons
- Logos
- Images
- Rich-text HTML
- Hyperlinks
- Variables
- Any other HTML constructs

Assign the email_client_quick_message_author role to business managers so that they can create quick messages for users in their group.

For more information on how to create a quick message, see Define a quick message.

Using response templates

Resolve cases faster and more efficiently with response templates. Response templates are reusable messages that can be copied to draft emails to provide quick and consistent messages to users. Each template is associated with a table that is an extension of the Task [task] or Interaction [interaction] table. Response templates include a short name for specifying a shortcut that can be used to identify the message.

Open the response template that you want to use for your email and select **Copy to clipboard**. You can now paste the contents of this template at the place of the cursor. It doesn't replace the content that you created before selecting the response template. To replace existing content with a response template content, highlight the text to replace and then select a response template.

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By default, the following response templates are provided for these standard procurement objects:

- Procurement case: Standard closure response, procurement contacts, policy instructions, and additional information.
- Purchase requisition: Placing of purchase order is in process, procurement contacts, and policy instructions.
- Sourcing request: Placing of purchase order is in process, procurement contacts, and policy instructions.
- Negotiation: Procurement contacts, and policy instructions.
- Sourcing 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.

View received, sent, and draft emails on procurement records

Procurement specialists can see the emails associated with a purchase requisition, purchase order, or procurement case directly on the record, instead of switching to a separate mailbox.

Organizations that are migrating from an email-first process often need to keep received, sent, and draft emails visible alongside the record they relate to. Purchase requisitions, purchase orders, and procurement cases include related lists that surface these emails without requiring the procurement specialist to leave the record or search a separate mailbox.

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Which records show which email related lists

Purchase requisitions, purchase orders, and procurement cases all have the same three related lists: **Received Emails**, **Sent Emails**, and **Draft Emails**. Received Emails is new; Sent Emails and Draft Emails already existed on all three record types.

Email related lists by record type

Record type	Related lists available
Purchase requisition	Received Emails, Sent Emails, Draft Emails
Purchase order	Received Emails, Sent Emails, Draft Emails
Procurement case	Received Emails, Sent Emails, Draft Emails

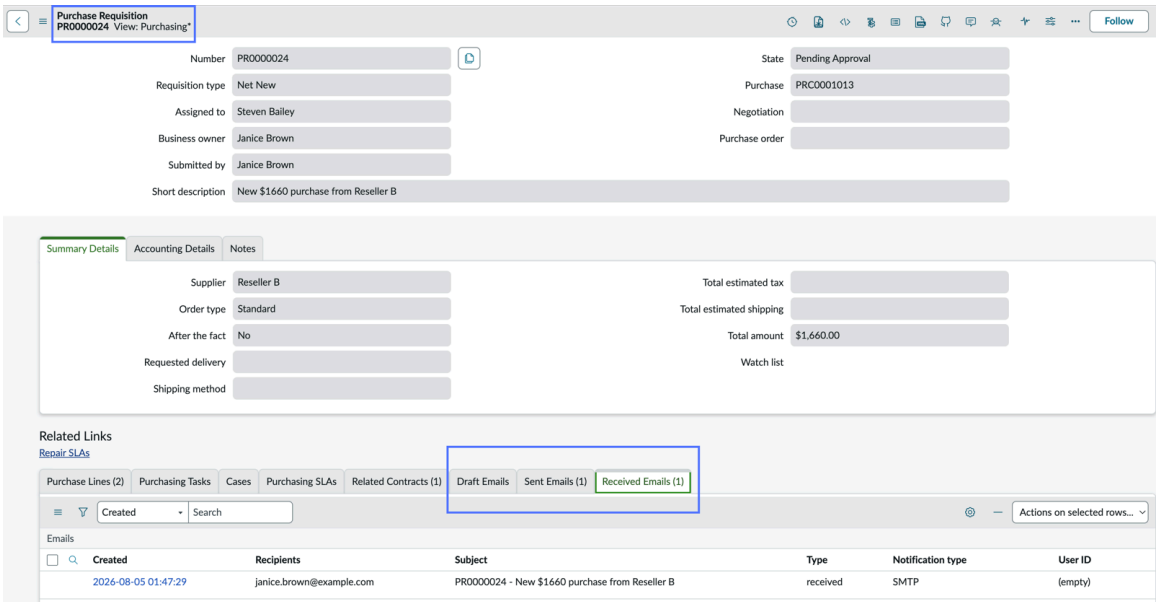
Where the related lists appear

The email related lists appear in the following interfaces:

Core UI

Related lists for Draft Emails, Sent Emails, and Received Emails appear in the related lists section of purchase requisition, purchase order, and procurement case records, alongside other related lists.

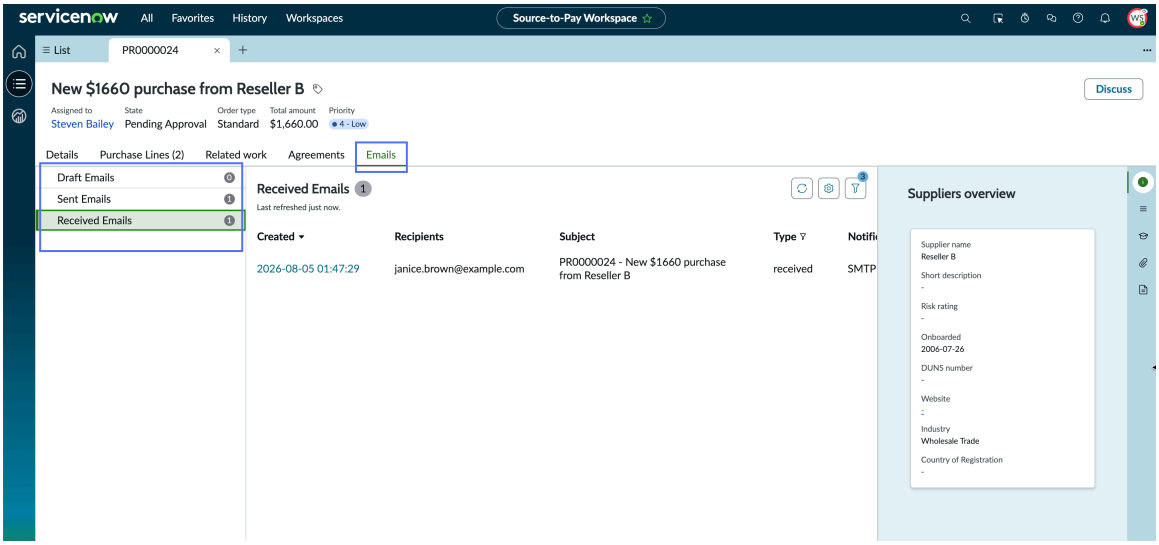
Note: The Received Emails related list appears only in the Purchasing view.



Source-to-Pay Workspace

Open a purchase requisition, purchase order, or procurement case record, and select the **Emails** related list tab. Select Draft Emails, Sent Emails, or Received Emails depending on the email type you want to review. Each tab displays the date, recipients, and subject for every email.

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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
- Sourcing event

For information on how Agent assist is set up and configured on the ServiceNow AI Platform, see Configure a record page for a workspace in Workspace Builder.

Interaction Management in Source-to-Pay Workspace

Interactions are a centralized location for all communication channels available in Source-to-Pay Workspace. Interaction Management involves managing procurement related queries from different sources such as an email, chat, message, or SMS.

Interaction Management overview

Any procurement related assistance that a procurement specialist or a live agent provides to a shopper in the form of a call, chat, email, or SMS is recorded in an interaction record.

Also, any supplier-related assistance that a supplier manager or a live agent provides to a supplier contact in the form of a call, chat, email, or SMS is recorded in an interaction record.

For more information about Interaction Management, see .

Interaction Management activities in Source-to-Pay Workspace include:

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- View interaction details in Source-to-Pay Workspace
- Create a procurement case
- Associate a record with an interaction

View interaction details in Source-to-Pay Workspace

View the details of an interaction record to analyze interactions and take immediate actions. Viewing an interaction record provides a comprehensive view of the customer journey. You can link an interaction record to an existing procurement case or can assign a task, which needs a procurement specialist involvement for investigation.

Before you begin

Role required: Procurement specialist, agent

Procedure

1. Navigate to **All** > **Procurement Case Management**.
2. Select the List icon ( ) and select **Interactions** >**All**.
3. View interactions in the desired category to associate a record with a procurement case or a task.

   - Assigned to me- Interactions assigned to a user
   - Active-Interactions ready to be investigated
   - All- All interactions

4. Select an interaction record to view its details.

Details form

Field	Description
Number	System-generated unique interaction number
Type	Mode of interaction
State	Status of the record
Opened for	The virtual agent name
Assigned to	The virtual agent assigned to the interaction record
Transcript	Text record of the conversation between an agent and the customer

5. **Optional:** View the procurement cases assigned to an interaction record by accessing the **Related tasks** tab.
6. **Optional:** View information about the assigned virtual agent, attachments added to the interaction, and templates for use in the contextual side panel.

Associate an interaction record with a related procurement case in Source-to-Pay Workspace

Associate an interaction record to a procurement case if your interaction is related to an existing procurement case. You can also associate a task to an interaction record to track your actions related to the interaction.

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Before you begin
Role required: Live agent, Procurement specialist

Procedure
1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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.

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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Components of Procurement Case Management dashboard

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.

End user and roles

End user goals and associated 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

Exploring the procurement case management implementation

Sourcing and Procurement Operations (SPO) provides a guided admin implementation experience and a unified experience for procurement specialists and requesters.

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SPO users

Users

User	Description
Administrator	Installs SPO from the Product Hub and configures it through the SPO Configuration Console.
Procurement specialist	Manages and resolves procurement cases in the Source-to-Pay Workspace, guided by playbooks and supported by ServiceNow Otto AI skills.
Employee or requester	Submits procurement requests through intake forms on the employee center, and tracks case progress using stepper statuses.

Key benefits

Key benefits

Benefit	Feature	Users
Guided admin implementation	• A single, entitlement-driven entry point on Admin Home • A Product Hub with installation status tracking and learning resources • A structured, sequenced Configuration Console with step indicators, progress tracking, and inline learning resources • ServiceNow Otto agent assistance on supported configuration items	Administrator
Unified specialist experience	• A purpose-built Source-to-Pay Workspace with configurable case forms and list views • Playbooks that guide specialists through the activities required to resolve each case type	Procurement specialist

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Key benefits (continued)

Benefit	Feature	Users
	• An activity stream with field-level tracking and role-based visibility • ServiceNow Otto AI skills for case summarization, email response drafting, and sentiment analysis	
Self-service procurement requests	• Intake forms surfaced as catalog tiles on the employee center • Plain-language stepper statuses showing case progress • Notifications at key stages of the case lifecycle	Employee or requester

What to explore next

To learn more about installing and configuring procurement case management in Sourcing and Procurement Operations, see:

- Sourcing and Procurement Operations product tile
- Sourcing and Procurement Operations Configuration Console
- Configuring case management in Sourcing and Procurement Operations

Spend and Savings Management

Category management is a strategic procurement approach that involves managing a group of related products or services to maximize value, optimize costs, and enhance supplier relationships. Essentially, it's the structured management of category taxonomy, ensuring that goods and services are categorized, sourced, and managed efficiently to drive better decision-making and operational efficiency.

The Spend and Savings Management (sn_spend_mgmt) feature enables category managers to import and manage their organization's category taxonomy. By incorporating this taxonomy into the ServiceNow system, category managers can streamline procurement processes, track spending, and evaluate savings more effectively at the category level.

Important: Check your entitlements to determine whether you have access to Spend and Savings Management.

The Spend and Savings Management application offers the following key benefits:

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- **Cost optimization**: Analyze spending across categories to identify areas for cost reduction through better supplier negotiations, volume discounts, and contract optimization.
- **Improved visibility**: Categorize spend to gain insights into where money is being spent, enabling better decision-making and control over expenses.
- **Strategic sourcing**: Consolidate spend within specific categories to achieve better pricing and terms with suppliers.
- **Risk management**: Identify potential supplier risks early on by closely monitoring spend within categories and ensuring compliance with regulatory requirements.
- **Enhanced procurement efficiency**: Streamline the procurement process by focusing on key categories, reducing unnecessary administrative tasks.
- **Data-driven decision making**: Use data analytics to identify trends and make informed procurement decisions based on category performance.
- **AI-driven savings discovery**: Use AI agents to automatically scan contracts, spend, and supplier data on a recurring schedule to surface ranked savings opportunities for category managers to review and act on.

For more information about using Spend and Savings Management, see Using Spend and Savings Management.

For more information about how AI agents identify savings opportunities across contracts, spend, and supplier data, see Savings opportunity identification.

Required role

Category manager admin (sn_spend_mgmt.category_manager_admin): Can import the category taxonomy and update the Spend Category and Spend Category Stage tables.

Tables installed

Spend category stage tables

Table	Description
Spend Category (sn_spend_mgmt_category)	Stores data about spend categories.
Spend Category Stage (sn_spend_mgmt_category_stage)	Temporarily stores important data about spend categories before this data is sent to the Spend Category (sn_spend_mgmt_category) primary table.
Spend to Product Category Mapping (sn_spend_mgmt_m2m_spend_product)	Stores the mapping of spend categories to product categories.

Components installed with Spend and Savings Management

Several types of components are installed with activation of the Spend and Savings Management (sn_spend_mgmt) plugin, including user roles and tables.

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Roles installed

Role title [name]	Description	Contains roles
sn_spend_mgmt.category_manager_admin	Can import the category taxonomy, update the Spend Category and Spend Category Stage tables and update the Spend category to Product category mappings.	None
sn_spend_mgmt.sourcing_category_manager	Can view and access the Category management tab and the Savings dashboard in Spend and Savings Management.	sn_shop.procurement_specialist

Tables installed

Table	Description
Spend Category (sn_spend_mgmt_category)	Stores data about spend categories.
Spend Category Stage (sn_spend_mgmt_category_stage)	Temporarily stores important data about spend categories before this data is sent to the Spend Category (sn_spend_mgmt_category) primary table. Extends the Import Set Row (sys_import_set_row) table.
Spend to Product Category Mapping (sn_spend_mgmt_m2m_spend_product)	Stores the mapping of spend categories to product categories.

Category management tab

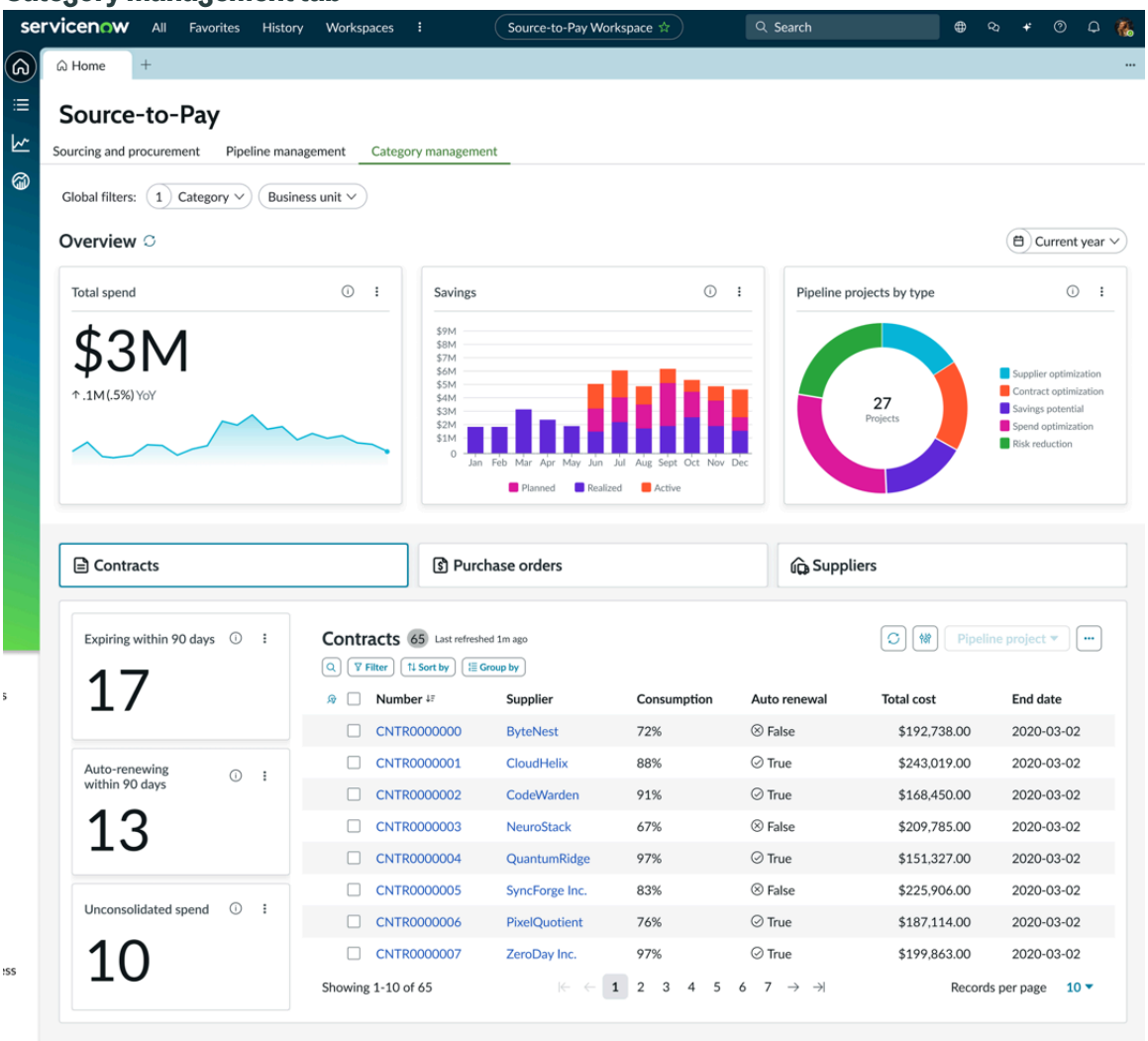
The Category management tab provides an overview of spend, savings, and pipeline projects, highlights savings opportunities, and enables creating pipeline projects directly from filtered lists.

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To view the Category management tab in the Source-to-Pay Workspace, you must have the sn_spend_mgmt.sourcing_category_manager role and have the following applications installed:

- Spend and Savings Management (sn_spend_mgmt)
- Sourcing Pipeline Management (sn_spend_pipeline)

Category management tab



Components in the Category management tab

Components in Category management tab

Title	Type	Description
Global filters		
Global filters	Filter	You can filter the data using the following filter types and sources: • Date: Supports predefined ranges (for example, Last 3 months, Last 6 months, Last month, Last year, This year, YTD) and custom date ranges.

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Components in Category management tab (continued)

Title	Type	Description
		• Category: Multi-select drop-down list populated from the Spend category table. • Supplier: Multi-select drop-down populated from the 'Supplier' table. To apply a filter, select a filter type (for example, Supplier), and choose one or more filter values (such as Adobe Systems or Apple, Inc.), and then move the selected filter value from the Available list to the Applied list.
Overview		
Total spend	Single Score with Line graph	Displays total spend from all settled invoices for the selected time period, along with a trend line showing spend progression over time. **Note:** The spend data covers only the last 750 days. You can run the `Populate line payments on invoice line` fix script and modify the period to retrieve spend data for their preferred date range.
Savings	Bar graph	Displays the savings amount (planned, realized, active) for all pipeline projects for the selected time period. **Note:** Displays the savings score based on the annualized data provided on the pipeline object. When calculating each pipeline project's savings, the dashboard considers the overlap between the selected date-range filter and the project's start and end dates.
Pipeline projects by type	Ring chart	Displays the pipeline projects by the following type for the selected time period: • Supplier optimization • Contract optimization • Savings potential • Spend optimization • Risk reduction
Contracts		
Expiring within 180 days	Single score	Contracts with end dates within the next 180 days.

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Components in Category management tab (continued)

Title	Type	Description
Auto-renewing within 90 days	Single score	Contracts with auto-renew flag set to true and renewal due in 90 days.
Unconsolidated spend	Single score	Contracts with the same suppliers for different business owners or purchasing entity.
Contracts	List	All contracts for the selected category. When you create a pipeline project from the Contracts list by selecting **Pipeline project** > **Create new** or **Add to existing**, the **Project type** field in the Create New Pipeline Project form is automatically populated with Contract Optimization. You can view the contract details in the Associated Records section. **Note:** A contract record can be associated with only one active pipeline project record at a time.
Purchase order lines		
Off-contract spend	Single score	POLs of POs where the contract field is null (no linked contract).
Non-preferred supplier spend	Single score	POLs of POs with suppliers where Preferred flag is set to **No**.
Spend fragmentation	Single score	Same product procured from different suppliers.
Purchase order lines	List	POLs in the selected category. When you create a pipeline project from the Purchase Orders list by selecting **Pipeline project** > **Create new** or **Add to existing**, the **Project type** field in the Create New Pipeline Project form is automatically populated with Spend Optimization. You can view the purchase order details in the Associated Records section. **Note:** A purchase order line record can be associated with only one active pipeline project record at a time.
Suppliers		
Total suppliers in this category	Single score	Suppliers with performance score less than 95%. **Note:** The widgets in the Suppliers section vary based on whether Third-party Risk Management or Supplier Lifecycle Operations is installed.

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Components in Category management tab (continued)

Title	Type	Description
Non-preferred suppliers	Single score	Suppliers where Preferred flag is set to **No**.
New Suppliers Added	Single score	New suppliers added in the selected time period.
Suppliers	List	List of active suppliers. When you create a pipeline project from the Suppliers list by selecting **Pipeline project** > **Create new** or **Add to existing**, the **Project type** field in the Create New Pipeline Project form is automatically populated with Supplier Optimization. You can view the supplier details in the Associated Records section. **Note:** A supplier record can be associated with only one active pipeline project record at a time.

Category analytics

Within the Source-to-Pay Workspace, the Category analytics module includes the Savings dashboard that offers procurement teams a unified view of savings opportunities across the sourcing pipeline.

Open the Source-to-Pay Workspace and select the Category Analytics icon (). The Category analytics module opens, displaying the Savings dashboard.

Users with th sn_spend_mgmt.sourcing_category_manager role can view and access the Savings dashboard in the Category analytics module.

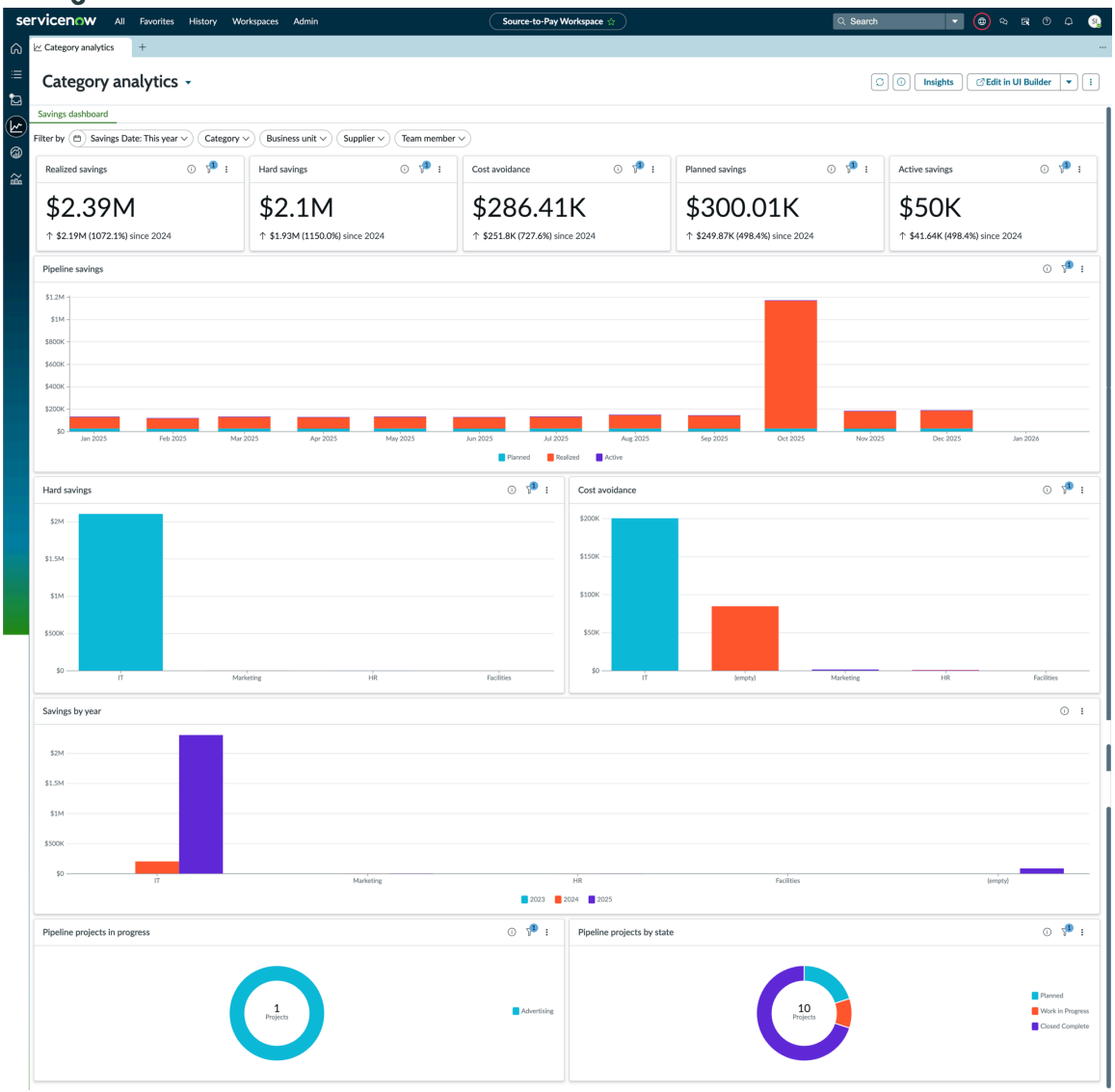
Savings dashboard

The Savings dashboard provides procurement teams with a consolidated view of savings opportunities across all pipeline project data.

The Savings dashboard helps users analyze category performance, track potential and realized savings, and monitor project progress from opportunity identification to savings realization.

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Savings dashboard



Components in the Savings dashboard

Components in Savings dashboard

Title	Type	Description
Filter by	Filter	You can filter the data using the following filter types and sources: • Time: Supports predefined ranges (for example, Last month, Last year, This year, YTD) and custom date ranges. **Note:** The time filter considers all pipeline projects whose savings start date and savings end date overlap with the selected date range. • Category: Multi-select drop-down list populated from the Spend category table.

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Components in Savings dashboard (continued)

Title	Type	Description
		Note: If you do not select a category in the Category filter, the dashboard displays all data associated with the root categories. If you select a category, the dashboard displays data for that category and its child categories. In both cases, this data is displayed in the Hard savings, Cost avoidance, and Savings by year bar graphs. • Business Unit: Multi-select drop-down list populated from the Business unit table. • Supplier: Multi-select drop-down populated from the 'Supplier' table. • Team member: Searchable multi-select drop-down list based on the spend category manager column in the Spend category table. To apply a filter, select a filter type (for example, Supplier), and choose one or more filter values (such as Adobe Systems or Apple, Inc.), and then move the selected filter value from the Available list to the Applied list.
Realized savings	Single score	Total realized savings (hard savings, cost avoidance, and other savings) from all completed pipeline projects.
Hard savings	Single score	Total hard savings from all the completed pipeline projects.
Cost avoidance	Single score	Total cost avoidance from all the completed pipeline projects.
Planned savings	Single score	Total estimated savings (estimated hard savings + estimated cost avoidance) from all planned pipeline projects.
Active savings	Single score	Total estimated savings (estimated hard savings + estimated cost avoidance) from all pipeline projects that are in progress.
Pipeline savings	Bar graph	Displays planned, realized, and active savings for the date range selected in the filter.
Hard savings	Bar graph	Displays hard savings for closed projects, grouped by category.

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Components in Savings dashboard (continued)

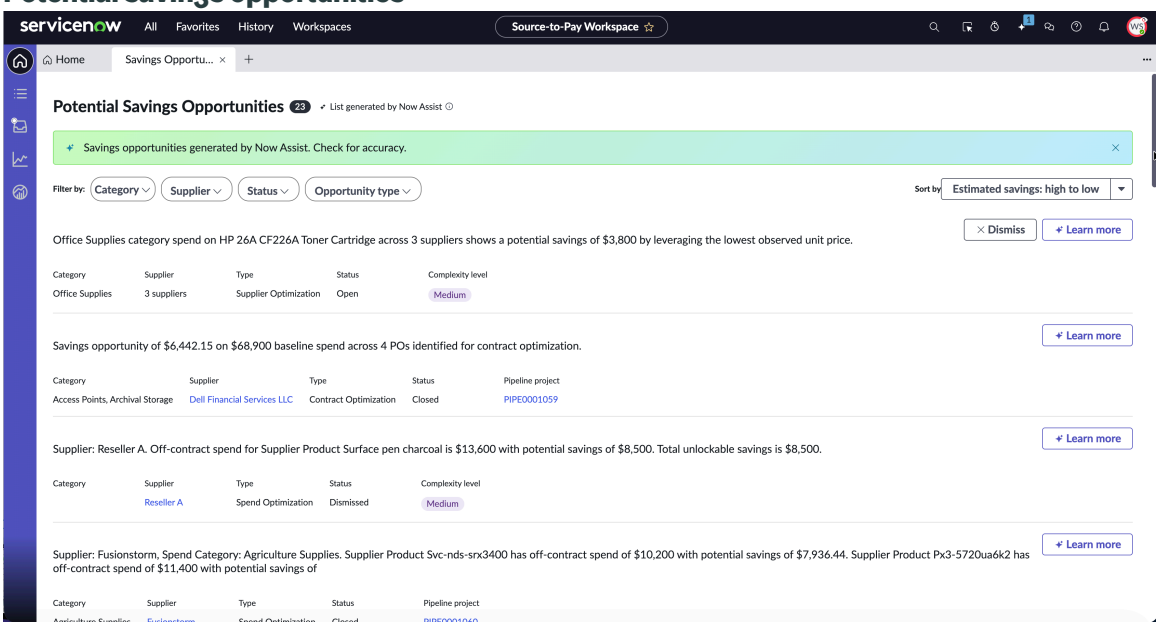
Title	Type	Description
Cost avoidance	Bar graph	Displays cost avoidance savings for closed projects, grouped by category.
Savings by year	Bar graph	Displays year-over-year realized savings, grouped by category.
Pipeline projects in progress	Ring chart	Displays count of in-progress pipeline projects, segmented by spend category.
Pipeline projects by state	Ring chart	Displays count of projects segmented by state (Draft, Planned, Work in Progress, Closed Complete).

Savings opportunity identification

The Savings Opportunity Discovery agentic workflow automatically scans contracts, spend, and supplier data to surface ranked savings opportunities, helping category managers focus on review and action rather than manual discovery.

The Savings Opportunity Discovery agentic workflow scans contracts, spend, and supplier data on a recurring schedule and writes ranked savings opportunities to the Savings Opportunities (`sn_spend_gen_ai_savings_opportunities`) table. An AI orchestrator triggers three optimization sub-agents in parallel, normalizes the results, and surfaces findings for category managers to review. Each opportunity carries an estimated savings value, a complexity assessment, and supporting insights. Category managers see only the opportunities tied to spend categories they own.

Potential savings opportunities



Plugin dependencies

The following plugins are required to use the Savings Opportunity Discovery agentic workflow:

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- Now Assist for Sourcing and Procurement Operations (SPO) (`sn_spend_gen_ai`)
- Sourcing Pipeline Management (`sn_spend_pipeline`)
- Spend and Savings Management (`sn_spend_mgmt`)

Business value

Category managers have historically relied on manual reviews of contracts, spend, and supplier data to identify sourcing opportunities. The process is inconsistent across categories and time-consuming, so opportunities are missed or surfaced too late to act on. Scheduled, agent-based identification produces consistent output for every spend category and lets the team focus attention on review, simulation, and action rather than discovery.

Savings lever framework

Each opportunity is associated with a savings lever that describes the specific source of savings. Levers currently supported include renewal caps, price escalations, payment terms, off-contract spend, unconsolidated spend, supplier consolidation, and non-preferred supplier spend. The framework supports additional levers without changes to the user-facing review surface.

Savings Opportunity Discovery agentic workflow

Savings Opportunity Discovery agentic workflow contains three Opportunity Finder agents.

Opportunity Finder agents

Agent	Analyzes	Savings levers covered
Contract Optimization Opportunity Finder Agent	Extracts contract clauses, including escalation percentages, renewal caps, and payment terms, and forecasts future spend under the existing terms.	Price Escalations & Renewal Caps; Payment Terms Optimization
Supplier Optimization Opportunity Finder Agent	Analyzes supplier spend for fragmentation across suppliers and for spend with non-preferred suppliers.	Non-preferred Supplier Spend; Unconsolidated Spend; Spend Fragmentation; supplier performance and risk
Spend Optimization Opportunity Finder Agent	Analyzes purchase order activity for off-contract spend, unconsolidated spend, and other spend-side levers.	Off-Contract Spend; Contract Leakage

The Savings Opportunity Finder Agents Scheduled Job runs the agents weekly. You can also run this scheduled job on-demand by entering `sysauto.list` in the navigation filter. Search for and open the Savings Opportunity Finder Agents Scheduled Job, and then select **Execute Now**.

When the Savings Opportunity Finder Agents Scheduled Job runs, the Savings Opportunity Discovery agentic workflow uses all three agents and scans procurement data across contracts, suppliers, and purchase order lines and creates records on the Savings Opportunities table (`sn_spend_gen_ai_savings_opportunities`).

Each opportunity record contains an estimated opportunity value, a savings lever, a confidence score, supporting data, and links to the suppliers, spend categories, and contracts the analysis drew from. Category managers review the opportunities, accept or dismiss them, and convert accepted opportunities into pipeline projects for tracking.

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For more information about the fields on a savings opportunity record, see Savings opportunity fields.

Opportunity lifecycle

Each run generates new opportunities and reconciles existing ones according to the current state of the record:

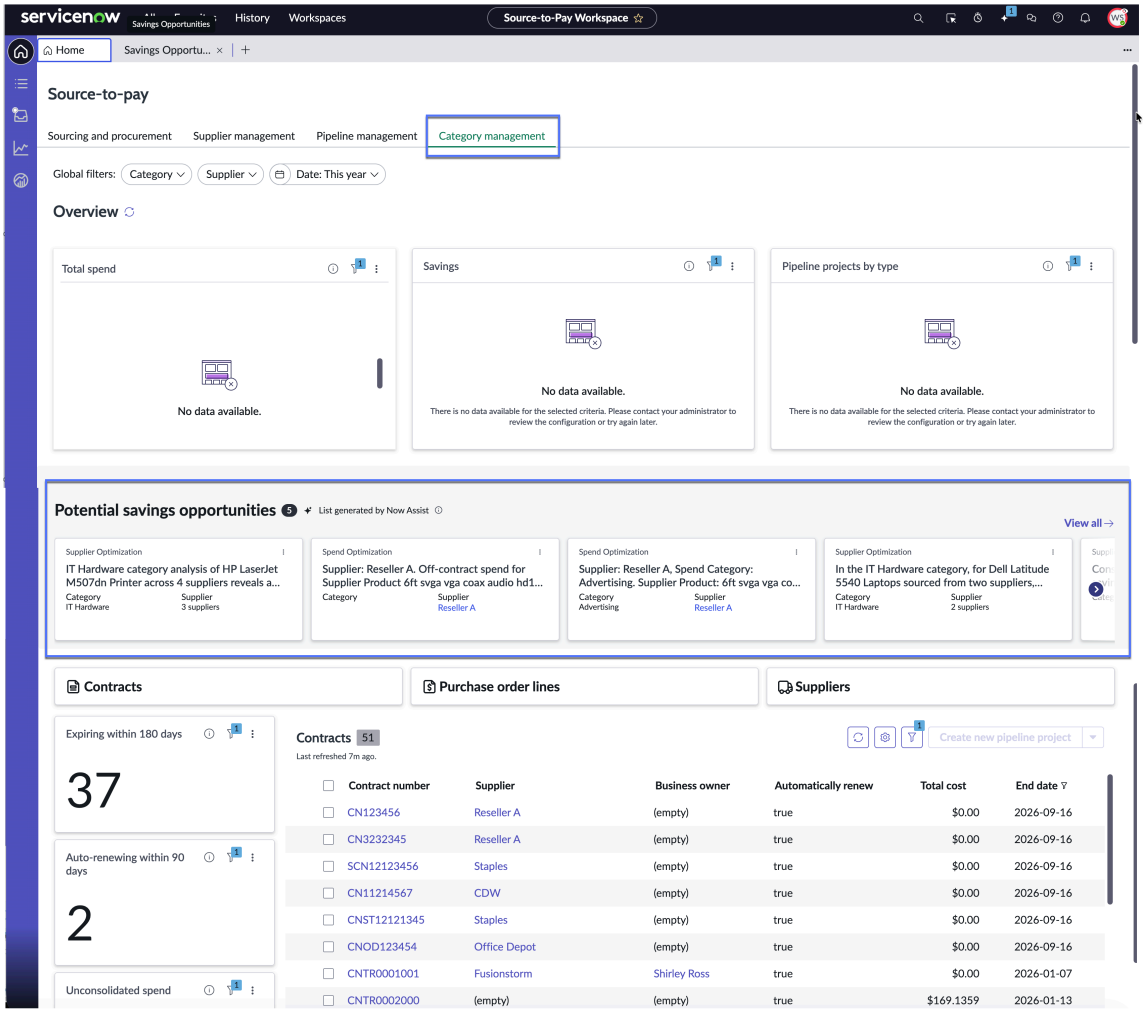
- An open opportunity that has not yet been acted upon is updated in place when its underlying data changes. For example, when new closed purchase order lines change the estimated savings.
- A dismissed opportunity can reappear if fresh data changes the estimate enough to invalidate the original dismissal.
- A closed opportunity for which a pipeline project has been created is not re-created. For spend and supplier optimization, the next run can create a delta opportunity that reflects only the new data since the original was actioned.

Decision and action flow

Opportunities appear in two places in the Source-to-Pay Workspace: a unified **Potential savings opportunities** page that lists every opportunity accessible to the signed-in user, and a **Category Management** tab scoped to the spend category in context. From either entry point, the user opens the Now Assist Panel by selecting **Learn more** for a single opportunity to review supporting insights, ask clarifying questions, run simulations, and either action or dismiss the opportunity.

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Category Management tab showing Potential savings opportunities section



When an opportunity is presented, the category manager can:

- Open the opportunity in the Now Assist Panel to review details, ask follow-up questions, and simulate alternative values.
- Act on the opportunity by creating a pipeline project with key fields prefilled from the opportunity.
- Dismiss the opportunity with one or more reasons selected from a checklist.

Acted and dismissed decisions are captured as feedback to improve future opportunity generation.

For more information about actioning or dismissing a savings opportunity, see Action or dismiss a savings opportunity.

Roles and access

Access to savings opportunity records is governed by the following roles:

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- sn_spend_mgmt.sourcing_category_manager: Read access to the Savings Opportunities (`sn_spend_gen_ai_savings_opportunities`) table and records.
- sn_spend_mgmt.category_manager_admin: Write access to opportunity records, and read and write access to the `sn_spend_gen_ai.savings_opportunity.cost_of_capital` system property.

Supplier optimization savings opportunities

The Supplier Optimization Opportunity Finder Agent identifies spend placed with non-preferred suppliers and fragmented across multiple suppliers for similar products. Addressing these opportunities helps redirect spend to preferred sources and consolidate supplier relationships.

The Supplier Optimization Opportunity Finder Agent analyzes supplier spend patterns to detect two types of savings opportunity: spend placed with non-preferred suppliers when a preferred alternative exists, and spend fragmented across multiple suppliers for similar products within the same spend category. Both levers use product similarity matching to identify consolidation opportunities.

Non-preferred supplier spend opportunities

A non-preferred supplier is a supplier that has not been designated as preferred for its spend category. Spend placed with non-preferred suppliers can reduce negotiated savings and weaken supplier governance. The agent identifies cases where the same or a closely related product is being purchased from a non-preferred supplier when a preferred alternative exists.

The agent processes purchase order lines where the supplier is not marked as preferred for the relevant spend category. The agent groups activity by supplier, spend category, and product, then attempts to match each non-preferred grouping to a preferred supplier that offers the same or a closely related product. Product similarity is determined by comparing product attributes and descriptions, including both direct matches and semantically related items in the same spend category.

To avoid reprocessing every purchase order on each run, the agent tracks the date of the last run and processes only purchase order lines updated after that date. Deduplication based on spend category, supplier, and savings lever prevents the agent from generating a duplicate opportunity for the same finding on subsequent runs.

A non-preferred supplier opportunity captures the following information:

- The non-preferred supplier and the spend category where the activity was detected.
- The identified preferred supplier for the same or related products.
- The purchase order lines that contributed to the finding.
- The estimated savings from redirecting future purchases to the preferred supplier.

Spend fragmentation opportunities

Spend fragmentation occurs when an organization buys similar products or services from multiple suppliers within the same spend category. The agent detects these patterns and identifies opportunities to consolidate purchases to fewer suppliers to negotiate better pricing and reduce supplier management overhead.

The agent groups historical spend by spend category and checks for cases where similar goods or services are being purchased from multiple suppliers in the same category. Product similarity is determined by comparing product attributes and descriptions. For each fragmented group, the agent calculates the potential savings if the spend is consolidated under the supplier offering the most favorable terms in the category.

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The agent applies deduplication so that repeated weekly runs do not create a separate opportunity for the same fragmentation pattern. If new purchase activity changes the savings estimate, the existing open opportunity is updated rather than duplicated.

A spend fragmentation opportunity captures the following information:

- The spend category and the suppliers identified in the fragmented spend pattern.
- The amount of spend distributed across the multiple suppliers.
- The estimated savings from consolidating spend to the identified supplier.
- The currency used in the calculation, which reflects the session currency at the time the agent runs, with USD used when no session currency is available.

When you create a pipeline project from a spend fragmentation opportunity, the linked suppliers are attached to the project so that the sourcing team can reference the source evidence during supplier consolidation discussions.

Spend optimization savings opportunities

Spend Optimization Opportunity Finder Agent identifies opportunities where purchase activity is outside negotiated contracts or fragmented across multiple contracts. Addressing these opportunities helps redirect spend to contracted pricing and increase purchasing volume for negotiation.

Spend Optimization Opportunity Finder Agent analyzes purchase order activity from the preceding 12 months to detect patterns where spend is either outside contracted sources or spread across multiple contracts for the same supplier and product. The agent supports two savings levers: off-contract spend and unconsolidated spend.

Off-contract spend opportunities

Off-contract spend refers to purchases made without using a negotiated contract, often at prices higher than the contracted rate. The agent identifies categories and products where off-contract spend exists alongside on-contract spend so that sourcing teams can redirect future purchases to the contracted source.

The agent examines closed-paid and closed-released purchase order lines and determines whether each purchase was on-contract by matching against contract-to-purchase-order relationships and date ranges. The agent groups activity by supplier, spend category, and product, then separates on-contract activity from off-contract activity. For each grouping that contains both, the agent calculates the discount missed by buying off-contract and the potential savings from redirecting that spend to the contracted price.

For services, the agent normalizes the contract value over the duration of the service to derive a daily rate, which is then used when comparing on-contract and off-contract pricing. Rebates are not included in the savings estimate.

An off-contract spend opportunity captures the following information:

- The supplier and the spend category where off-contract activity was detected.
- The on-contract and off-contract purchase order lines that contributed to the finding.
- The estimated savings from moving the off-contract spend to the contracted price.

If a category, supplier, or product has only off-contract activity and no comparable on-contract activity, the agent does not generate an opportunity. A reference price is required to calculate the potential savings.

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Unconsolidated spend opportunities

Unconsolidated spend refers to purchases of the same or similar products or services placed across multiple contracts or business units with the same supplier. When these purchases are aggregated, the resulting volume can support negotiating a lower per-unit price or improved contract terms.

The agent examines purchase order lines from the preceding 12 months and groups activity by supplier, business unit, and product. The agent identifies cases where the same supplier delivers similar products across different contracts at different prices, then compares the actual prices paid against the lowest contracted price for the same or closely related product. The difference represents the potential savings from consolidating future purchases under the lower-priced contract.

An unconsolidated spend opportunity captures the following information:

- The supplier and the spend categories where the fragmentation was detected.
- The contracts and purchase order lines that contributed to the finding.
- The baseline spend and the estimated savings from consolidation.
- A complexity rating that reflects the number of source records involved.

When you act on an unconsolidated spend opportunity, the linked purchase orders are attached to the draft pipeline project under the Previous purchase orders related list so that sourcing teams can include the source evidence into the next negotiation.

If a grouping does not include enough recent activity, if the products cannot be matched as similar, or if there is no lower-priced contract available for comparison, the agent does not create an opportunity for that grouping. No administrator-configurable spend or volume thresholds apply.

Contract optimization savings opportunities

The Contract Optimization Opportunity Finder Agent identifies opportunities to reduce costs by renegotiating price escalations, renewal caps, and payment terms on supplier contracts.

The Contract Optimization Opportunity Finder Agent analyzes supplier contracts that have an attached document to extract clause-level data and identify opportunities to reduce future spend. Two savings levers are currently supported: price escalation and renewal caps, and payment terms. For each lever, the agent calculates the savings available from renegotiating the existing terms and displays the finding as a savings opportunity .

Price escalation and renewal cap opportunities

Many supplier contracts include clauses that allow the supplier to increase prices each year or at each renewal. Over multi-year terms, even small escalation percentages can compound into significant additional spend. The agent identifies contracts where renegotiating the escalation or renewal cap can produce measurable savings.

For each in-scope contract, the agent forecasts contracted spend under the current escalation clause and models an alternative scenario where the escalation is reduced. The default alternative scenario applies a 25 percent reduction relative to the original escalation percentage. This reduction is fixed and is not configurable.

The forecast period is derived from the contract validity or payment terms. If the contract document does not provide a duration, the agent defaults the forecast period to one year.

The agent calculates the cumulative difference between the baseline forecast and the negotiated forecast over the forecast period. For example, a contract with a $20M annual

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baseline and a 7 percent annual escalation produces a 3-year forecast of $64.3M. Reducing the escalation to 3 percent produces a forecast of $61.8M. The cumulative savings of $2.5M is the value shown on the opportunity.

A price escalation or renewal cap opportunity captures the following information:

- The contract analyzed and the supplier on the contract.
- The current escalation percentage extracted from the contract document.
- The proposed renegotiated escalation or renewal cap.
- The cumulative estimated savings over the forecast period.
- The contracts linked as source records for the eventual pipeline project.

When you act on the opportunity, the linked contract is attached to the draft pipeline project as a previous contract so that the sourcing team can carry the source evidence into renegotiation.

Payment terms opportunities

Payment terms set the timing of supplier invoice payments, such as Net 30 or Net 60. Extending payment windows or capturing early payment discounts can improve working capital. The agent analyzes contract clauses and historical payment data to identify contracts where these levers can produce financial benefit.

For contracts that have an attached document, the agent extracts the existing payment terms and any early payment discount clauses. The agent compares the current payment window against an extended window (typically 30 days longer) and calculates the working capital benefit using a configurable treasury rate. Where an early payment discount clause exists, the agent also models the savings from taking the discount.

The agent uses a configurable treasury rate, also called cost of capital, to estimate the value of extending payment windows. The rate is stored in the system property *sn_spend_gen_ai.savings_opportunity.cost_of_capital* (default value: 9 , expressed as a percentage). An administrator with the sn_spend_mgmt.category_manager_admin role can read and update this property.

If the remaining contract validity is less than one year, the agent prorates the savings estimate to reflect the actual time remaining on the contract.

A payment terms opportunity captures the following information:

- The contract analyzed and the supplier on the contract.
- The existing payment terms and the proposed extended payment terms.
- The early payment discount terms when present in the contract clauses.
- The estimated annual savings from the proposed change, calculated using the configured treasury rate.

Sourcing Pipeline Management

Sourcing Pipeline Management (sn_spend_pipeline) provides a centralized framework for creating, tracking, and executing sourcing initiatives through pipeline projects. It enhances efficiency through automated workflows, improves visibility into project progress, and simplifies savings tracking and forecasting.

Sourcing Managers gain access to a unified pipeline project workspace that consolidates sourcing events, negotiations, and contract management. Each pipeline project includes dedicated tabs for these components, along with UI actions to initiate them directly. All related

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work, including sourcing requests, is consolidated within the pipeline, providing complete, end-to-end visibility into sourcing activities.

Important: Check your entitlements to determine whether you have access to Sourcing Pipeline Management.

With the pipeline_management_admin role, you can configure the Pipeline project creation rule decision table to automate the creation of pipeline projects. The default pipeline project creation rule automatically creates a pipeline project when the total price of the products being sourced exceeds $250,000. When a sourcing intake request is submitted, a pipeline project is automatically created in the Draft state when the rule conditions are met. The pipeline project is associated with the sourcing request.

For more information about using Sourcing Pipeline Management, see Using Sourcing Pipeline Management.

Plugin dependencies

The following are the plugin dependencies that are required to use Sourcing Pipeline Management (sn_spend_pipeline).

- Source-to-Pay Common Architecture (sn_shop)
- Sourcing and Purchasing Automation (sn_pr)
- Spend and Savings Management (sn_spend_mgmt)

Viewing pipeline projects in the Source-to-Pay Workspace

You can view pipeline projects by navigating to the **Lists** tab in the Source-to-Pay Workspace. Within this tab, pipeline projects are accessible through the **Pipeline projects** sub-module under both the My work and All work modules. Additionally, you can access them via the **Sourcing pipeline: new request** submodule under the Review needed module.

Fulfillers can view their assigned pipeline projects directly in the Work to review panel on the Source-to-Pay Workspace landing page. Each pipeline project appears in a dedicated tile.

To filter and locate specific pipeline projects, fulfillers can use the All work types filter and select **Pipeline project** from the drop-down list.

Fulfillers can view tasks related to pipeline projects in the Distribution of Work section of the Summary panel on the Source-to-Pay Workspace workspace landing page. Pipeline projects also appear in the Recently updated section.

Components installed with Sourcing Pipeline Management

Several types of components are installed with activation of the Sourcing Pipeline Management (sn_spend_pipeline) plugin, including user roles and tables.

Roles installed

Role title [name]	Description	Contains roles
sn_spend_pipeline.pipeline_management_admin	Can configure the Pipeline project creation rule decision table to automate the	decision_table_admin

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Role title [name]	Description	Contains roles
	creation of pipeline projects.	
sn_spend_pipeline.sourcing_pipeline_user	Can view and access the Pipeline management tab.	None

Tables installed

Table	Description
Contract to Pipeline project Relationships (sn_spend_pipeline_m2m_contract)	Stores the many-to-many relationships between contracts and pipeline projects.
Purchase order to Pipeline project Relationships (sn_spend_pipeline_m2m_order)	Stores the many-to-many relationships between purchase orders and pipeline projects.
Purchase requisition to Pipeline project Relationships (sn_spend_pipeline_m2m_requisition)	Stores the many-to-many relationships between purchase requisitions and pipeline projects.
Sourcing Request to Pipeline project Relationships (sn_spend_pipeline_m2m_sourcing_request)	Stores the many-to-many relationships between sourcing requests and pipeline projects.
Supplier to Pipeline project Relationships (sn_spend_pipeline_m2m_supplier)	Stores the many-to-many relationships between suppliers and pipeline projects.
Pipeline Project (sn_spend_pipeline_project)	Stores the pipeline projects. Extends the Task (task) table.

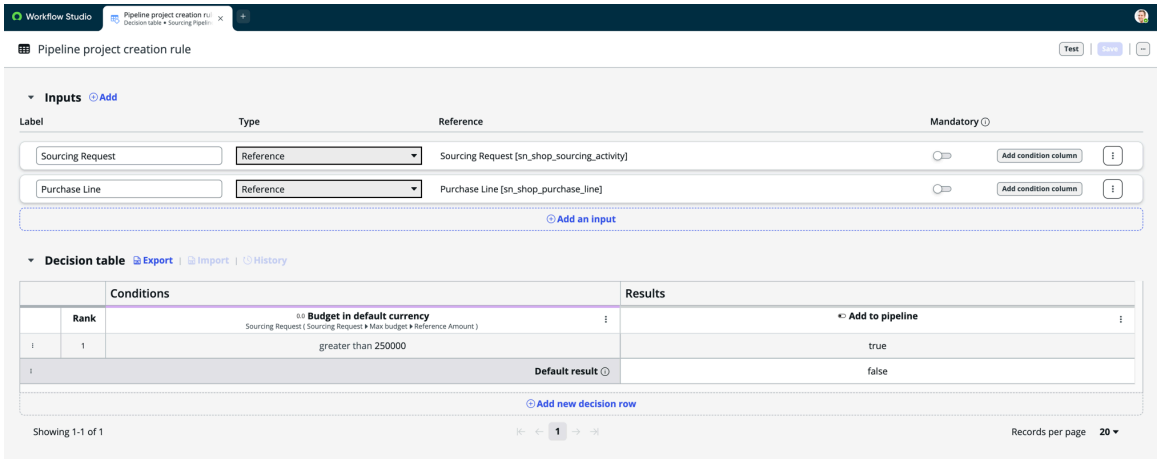
Pipeline project creation rule for high-value sourcing requests

By default, the Pipeline project creation rule decision table is used to create pipeline projects automtatically in Sourcing Pipeline Management.

Note: You must have the *sn_spend_pipeline.pipeline_management_admin* role to update the Pipeline project creation rule decision table configuration.

The *sn_spend_pipeline.pipeline_management_admin* role contains the *decision_table_admin* role, which enables you to create, read, edit, and delete decision table inputs, columns, and values. For more information about configuring decision tables, see Configuring decision tables.

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When a shopper requests pricing for items exceeding $250,000 through ShoppingHub, the following decision inputs are automatically evaluated to apply the rule conditions:

- Sourcing request [sn_shop_sourcing_activity]
- Purchase line [sn_shop_purchase_line]

The Pipeline project creation rule is applied to the Budget field in the Sourcing Request (SR). This rule determines whether a pipeline project should be created for the SR based on the following conditions:

- If the amount exceeds $250,000 USD, a pipeline project is created.
- If the amount is $250,000 USD or less, a pipeline project isn't created.

Note: If the currency is different from the USD, it's converted to USD before the rule conditions are applied.

Automatic pipeline project creation via Shopping Hub or Employee Center intake requests

When a shopper submits sourcing requests for products, pipeline projects are automatically created, provided the product price meets the budget conditions defined in the decision table.

By default, the budget threshold is set to $250,000. However, you can configure the budget conditions in the decision table to suit your business requirements. For more information, see Pipeline project creation rule for high-value sourcing requests.

If multiple sourcing requests are submitted for products that belong to the same spend category or the same sourcing manager, only a single pipeline project is created to group all those products.

Pipeline projects created automatically through sourcing intake requests are set to the Draft state.

Fields automatically populated in the pipeline project record

The following fields are automatically populated for pipeline project records created through an intake request:

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Field	Description
Short description	• If the intake request results in a single sourcing request (SR), the short description follows this format: PIPE00001 for <Product Name> • If multiple SRs are created from the same intake request, the format is: PIPE00001 Multiple requests for <Requestor Name>
Requestor	Populated based on the value provided in the **Who is this request for** field.
Number	An auto-generated number that uniquely identifies the pipeline project.
Estimated end date	If multiple SRs have different delivery dates, the earliest delivery date is used as the estimated end date.
Spend category	Derived from the Product Category field using predefined spend category to product category mappings. **Note:** If the sourcing requests in a pipeline project have different spend categories, the **Spend category** field is left blank. If the sourcing manager is the same across different spend categories, the requests are grouped into one pipeline project. In such cases, the **Spend category** field is left blank.

Sourcing requests grouping logic

The following conditions determine how sourcing requests (SR) are grouped into pipeline projects.

Grouping logic	Condition
Group SRs by spend category (if available)	• If an SR includes multiple products with different product categories, and category taxonomy is configured, then separate pipeline projects are created for each spend category. • However, if the sourcing manager is the same for those spend categories, they're grouped into one pipeline project. In this case, the **Spend Category** field is left blank in the grouped pipeline project.
Group SRs without spend categories	• SRs that do not have a spend category are grouped into a single pipeline project. • If four SRs are created from the same intake request, and three have spend categories while one doesn't, the one without is grouped with the others.
Spend category restrictions for adding SRs to a pipeline project	SRs can be added to an existing pipeline project in the following scenarios:

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Grouping logic	Condition
	• The spend category of the SRs matches with that of the pipeline project. • The spend category is blank and not defined for the SRs. • The SRs must be in either the Pending Review or Pending Approval state.

How pipeline project creation affects cancellation

The way a pipeline project is created determines when and how it can be canceled.

Pipe creation method	Cancellation behavior
Auto-created pipeline projects from sourcing requests	If a pipeline project is auto-created from a sourcing request (SR), and that SR is later canceled, the pipeline project is also canceled but only in Draft state. If the pipeline project has progressed to the Work in Progress (WIP) state, it isn't canceled, even if the associated SR is canceled.
Manually created pipeline projects	For pipeline projects created manually from the List view, the project isn't canceled even if the associated sourcing request is canceled.
For both auto-created and manually created pipeline projects	If all sourcing requests under a pipeline project are in Closed – Cancelled or Closed – Rejected state, the pipeline project also moves to the Closed – Cancelled state.

Email notifications for pipeline projects

Sourcing managers receive email notifications when a pipeline project is created automatically, and before its estimated start and end dates.

The email notification includes the **View pipeline project** option that navigates the sourcing manager to the Source-to-Pay Workspace View, where they can access the pipeline project's **Overview** tab.

System properties for Sourcing and Pipeline Management

The following system properties are used by Sourcing Pipeline Management to notify sourcing managers about upcoming pipeline project deadlines.

System property	Description
sn_spend_pipeline.days_before_start.notification	Number of days before the estimated start date to trigger an email to the sourcing manager if the project is not in Work in Progress, Closed Complete, or Closed Canceled state.
sn_spend_pipeline.days_before_end.notification	Number of days before the estimated end date to trigger an email to the sourcing manager if the project is not in Closed Complete or Closed Canceled state.

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Note: You must have the sn_spend_pipeline.pipeline_management_admin role to update the **Value** field in the system properties. The **Value** field defines the number of days before sending a notification email to the sourcing manager.

To access these properties, navigate to **All** and enter `sys_properties_list.do` in the application navigator. In the **Name** search field, enter the property name to locate it.

Scheduled jobs

Sourcing and Pipeline Management includes the following scheduled jobs for sending email notifications:

- Trigger Pipeline Start Notification
- Trigger Pipeline End Notification

Business rules

Sourcing and Pipeline Management includes the `Trigger pipe end or start notification` business rule, which runs in the following scenarios:

- When a pipeline project's estimated start date exceeds the value specified in the system property, the Trigger pipe end or start notification business rule runs. This business rule immediately sends email notifications to sourcing managers to keep them informed about project timelines. Email notifications are sent only for pipeline projects in the Draft or Planned state.
- When a pipeline project's estimated end date exceeds the value specified in the system property, the Trigger pipe end or start notification business rule runs. It immediately notifies sourcing managers via email. Email notifications are sent only for pipeline projects that are not in the Closed Complete or Closed Canceled state.

Pipeline management tab

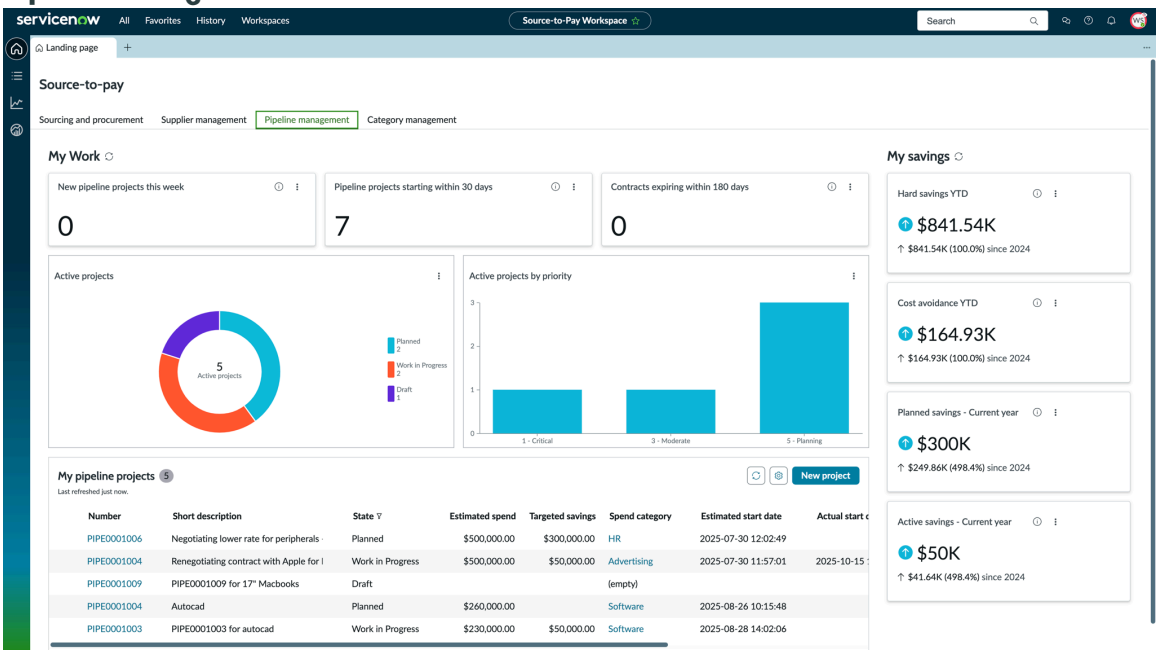
The Pipeline management tab enables you to get insights into savings and pipeline projects, improving visibility, tracking, and collaboration across teams.

To view the Pipeline management tab in the Source-to-Pay Worksapce, you must have the sn_spend_pipeline.sourcing_pipeline_user role and have the following applications installed:

- Spend and Savings Management (sn_spend_mgmt)
- Sourcing Pipeline Management (sn_spend_pipeline)

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Pipeline management tab



Components in the Pipeline management tab

Components in Pipeline management tab

Title	Type	Description
My work		
New pipeline projects this week	Single score	Displays the projects that are new this week and assigned to the logged-in user.
Pipeline projects starting withing 30 days	Single score	Displays the pipeline projects assigned to the logged-in user with an estimated start date due in 30 days or less.
Contracts expiring within 180 days	Single score	Displays the contracts with an expiration date in 180 days or less, where the logged-in user is the contract administrator.
Active projects	Ring chart	Displays the active projects assigned to the logged-in user, excluding projects in the Closed completed or Closed cancelled states.
Active projects by priority	Bar graph	Displays the projects by priority assigned to the logged-in user, excluding projects in the Closed completed or Closed cancelled states.
My pipeline projects	List	Displays a list of all active pipeline projects assigned to the logged-in user, sorted by priority and excluding projects in the Closed completed or Closed cancelled states.
My savings		
Hard savings YTD	Single score	Displays the total hard savings from closed and completed pipeline projects assigned to the logged-in user, where the savings end date is greater than or equal to the current year.

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Components in Pipeline management tab (continued)

Title	Type	Description
		Note: The My Savings section displays the savings scores calculated from the annualized data entered on the pipeline object. For more information about how the Hard Savings YTD metric is calculated, see Hard Savings YTD metric calculation.
Cost avoidance YTD	Single score	Sum of all the Cost avoidance on the Closed Completed pipeline projects assigned to the logged in user, where the savings end date is greater than or equal to the current year. For more information about how the Cost Avoidance YTD metric is calculated, see Cost Avoidance YTD metric calculation.
Planned savings - Current year	Single score	Total estimated savings (estimated hard savings + estimated cost avoidance) from planned pipeline projects assigned to the logged-in user, where the estimated end date falls within the current year. For more information about how the Planned Savings (Current Year) metric is calculated, see Planned Savings (Current Year) metric calculation.
Active savings - Current year	Single score	Displays the total estimated savings (estimated hard savings + estimated cost avoidance) from in-progress pipeline projects assigned to the logged-in user, where the estimated end date falls within the current year. For more information about how the Active Savings (Current Year) metric is calculated, see Active Savings (Current Year) metric calculation.

Hard Savings YTD metric calculation

Hard Savings YTD (Year-to-Date) shows the total realized savings from pipeline projects that were closed and completed within the current calendar year. These are confirmed, negotiated savings — not estimates or projections.

Metric definition

The following attributes define the Hard Savings YTD metric:

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Attribute	Detail
Metric name	Hard Savings Year-to-Date
Pipeline state	Closed Complete
Savings field	Annual hard savings
Date range	January 1 to December 31 of the current year
Proration	Yes — based on the overlap between the project's savings period and the current year
Year-over-year comparison	Yes — the metric automatically compares the current year total against the same date range in the previous year

Key concepts

- **Annual hard savings** is the field on a pipeline project record that holds the actual negotiated savings value, entered when the project is closed and completed.
- Only projects in Closed Complete state contribute to this metric.
- Savings are prorated based on how many days of the project's savings period fall within the current calendar year.
- For projects that span more than one year, the per-day savings rate is calculated using a 365-day cap. This prevents multi-year project totals from being diluted across the full project duration and ensures the metric always reflects an annual savings rate.

How Hard Savings YTD Is Calculated

The following steps describe how the system arrives at the Hard Savings YTD figure displayed on the dashboard widget.

1. **Establish the date range.** The system sets the calculation range to January 1 through December 31 of the current calendar year. This same process also runs against the previous calendar year to enable year-over-year comparison.
2. **Identify qualifying projects.** The system queries the pipeline project table for all projects assigned to the current user that meet the following criteria:
   - The project is in **Closed Complete** state.
   - The project has a savings start date and a savings end date.
   - The savings period overlaps with the target year — the savings start date falls on or before December 31, and the savings end date falls on or after January 1.
   - The project has a non-zero value in the Annual hard savings field.
3. **Calculate overlap days for each project.** For each qualifying project, the system determines how many days the project's savings period fall within the target year. This is the number of days between the later of (the savings start date or January 1) and the earlier of (the savings end date or December 31).
4. **Calculate the per-day savings rate.** The system divides the project's total hard savings value by the project's duration in days. If the project spans more than 365 days, the duration is capped at 365 to normalize the rate to an annual basis.
5. **Prorate the savings.** The prorated savings for each project equals the per-day rate multiplied by the number of overlap days. Projects where the savings period falls entirely within the current year receive their full hard savings value.

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6. **Aggregate and round.** The prorated savings values for all qualifying projects are added together. The result is rounded to two decimal places.
7. **Compute the year-over-year comparison.** Steps 2–6 run a second time against the previous calendar year. The system calculates the difference and percentage change between the two year totals.
8. **Return the result.** The current year total is displayed as the Hard Savings YTD value on the dashboard widget, together with the year-over-year change indicator.

Proration formula

Prorated Savings = (Hard Savings ÷ min(Project Days, 365)) × Overlap Days.

Overlap Days = the number of days the project's savings period intersects with the target year's date range.

The 365-day cap explained: For a project that spans 1,095 days (3 years), using the actual project duration as the divisor would spread the savings across 1,095 days and significantly understate the annual figure. Capping the divisor at 365 ensures the per-day rate reflects the project's intended annual savings value, not a fraction of it.

Example calculation

The following scenario demonstrates how Hard Savings YTD is calculated for three pipeline projects during the year-to-date range of January 1 to December 31, 2024:

Pipeline	State	Hard Savings	Savings Start	Savings End	Project Days
PIPE-001 (Supplier Renegotiation)	Closed Complete	$120,000	Jan 1, 2024	Dec 31, 2024	365
PIPE-002 (Contract Consolidation)	Closed Complete	$365,000	Jul 1, 2024	Jun 30, 2025	365
PIPE-003 (Multi-Year Agreement)	Closed Complete	$730,000	Jan 1, 2023	Dec 31, 2025	1,095

PIPE-001: Full overlap

- Project duration = 365 days
- Overlap with YTD range = 365 days (project falls entirely within the year)
- Per-day rate = $120,000 ÷ 365 = $328.77/day
- Prorated savings = $328.77 × 365 = $120,000.00

PIPE-002: Partial overlap (starts mid-year)

- Project duration = 365 days (Jul 1, 2024 – Jun 30, 2025)
- Overlap with YTD range = 184 days (Jul 1 – Dec 31, 2024)
- Per-day rate = $365,000 ÷ 365 = $1,000.00/day
- Prorated savings = $1,000.00 × 184 = $184,000.00

PIPE-003: Multi-year project (365-day cap applies)

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- Project duration = 1,095 days (Jan 1, 2023 – Dec 31, 2025) — **exceeds 365 days**
- Overlap with YTD range = 365 days (full year 2024)
- Per-day rate = $730,000 ÷ **365 (capped)** = $2,000.00/day
- Prorated savings = $2,000.00 × 365 = $730,000.00

Why the cap matters here: PIPE-003 spans 1,095 days across three years. Without the 365-day cap, the per-day rate would be $730,000 ÷ 1,095 = $667/day — and only $243,333 would be attributed to 2024. The cap corrects for this by treating the savings as an annual figure, which returns the full $730,000 to the 2024 total.

Final aggregation

The final aggregation sums the prorated values:

Pipeline	Prorated Hard Savings
PIPE-001	$120,000.00
PIPE-002	$184,000.00
PIPE-003	$730,000.00
Total Hard Savings YTD	**$1,034,000.00**

Cost Avoidance YTD metric calculation

Cost Avoidance YTD measures the costs that were prevented through pipeline projects during the current calendar year. Unlike hard savings, which reflect a direct reduction in spend, cost avoidance captures expenditures that were not incurred.

Cost avoidance captures prevented expenditures such as avoiding a price increase, preventing an unnecessary purchase, or reducing exposure to a risk-related cost. The metric operates on the same proration engine as Hard Savings YTD but reads from a different field on the project record.

Metric definition

The following attributes define the **Cost Avoidance YTD** metric:

Attribute	Detail
Metric name	Cost Avoidance Year-to-Date
Pipeline state	Closed Complete
Savings field	Annual cost avoidance
Date range	January 1 to December 31 of the current year
Proration	Yes — based on the overlap between the project's savings period and the current year
Year-over-year comparison	Yes — the metric automatically compares the current year total against the same date range in the previous year

Differences between cost avoidance and hard savings

Cost avoidance and hard savings represent distinct types of financial impact:

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Aspect	Hard Savings	Cost Avoidance
Nature	Direct reduction in budget spend	Prevention of a cost that would otherwise have been incurred
Field on project record	Annual hard savings	Annual cost avoidance
Visibility on P&L	Directly reflected	Counterfactual — represents what was not spent
Calculation logic	Identical — both use the same proration engine	Identical — both use the same proration engine

How Cost Avoidance YTD Is Calculated

The calculation follows the same steps as Hard Savings YTD. The only difference is that the system reads the **Annual cost avoidance** field on each project record rather than the Annual hard savings field.

- **Establish the date range**: The system sets the calculation range to January 1 through December 31 of the current calendar year. The same process also runs against the previous year for comparison.
- **Identify qualifying projects**: The system queries the pipeline project table for all Closed Complete projects assigned to the current user where the savings period overlaps with the target year and the project has a non-zero value in the Annual cost avoidance field.
- **Calculate overlap days for each project**: The system identifies how many days of the project's savings period fall within the target year.
- **Calculate the per-day savings rate**: The project's total cost avoidance value is divided by its duration in days, capped at 365 days for projects that span more than one year.
- **Prorate the savings**: The prorated cost avoidance for each project equals the per-day rate multiplied by the overlap days.
- **Aggregate and round**: The prorated values for all qualifying projects are summed and rounded to two decimal places.
- **Compute the year-over-year comparison**: The same steps run against the previous year, and the system calculates the difference and percentage change.

Proration formula

The proration formula calculates the portion of cost avoidance that falls within the target year:

Prorated Cost Avoidance = (Cost Avoidance ÷ min(Project Days, 365)) × Overlap Days

Overlap Days represents the number of days the project's savings period intersects with the target year's date range.

Example calculation

The following scenario demonstrates how **Cost Avoidance YTD** is calculated for two pipeline projects during the year-to-date range of January 1 to December 31, 2024:

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Pipeline	State	Cost Avoidance	Savings Start	Savings End	Project Days
PIPE-101 (Prevented Price Increase)	Closed Complete	$200,000	Apr 1, 2024	Mar 31, 2025	365
PIPE-102 (License Optimization)	Closed Complete	$90,000	Jan 1, 2024	Jun 30, 2024	181

PIPE-101 has a partial overlap with the year-to-date range:

- Project duration = 365 days (Apr 1, 2024 – Mar 31, 2025)
- Overlap with YTD range = 275 days (Apr 1 – Dec 31, 2024)
- Per-day rate = $200,000 ÷ 365 = $547.95/day
- Prorated cost avoidance = $547.95 × 275 = $150,684.93

PIPE-102 falls entirely within the year-to-date range:

- Project duration = 181 days
- Overlap with YTD range = 181 days (project falls entirely within the year)
- Per-day rate = $90,000 ÷ 181 = $497.24/day
- Prorated cost avoidance = $497.24 × 181 = $90,000.00

Final aggregation

The final aggregation sums the prorated values:

Pipeline	Prorated Cost Avoidance
PIPE-101	$150,684.93
PIPE-102	$90,000.00
Total Cost Avoidance YTD	**$240,684.93**

Planned Savings (Current Year) metric calculation

Planned Savings (Current Year) shows the projected savings from pipeline projects in **Planned** state—projects approved and scheduled but not yet started. This metric uses the **Targeted savings** field to represent future savings goals.

Planned Savings (Current Year) tracks savings expected from pipeline projects that have been approved but where work has not begun. The metric reads from the **Targeted savings** field, which holds the savings goal set during project creation.

Note: Both Active Savings and Planned Savings read from the **Targeted savings** field. This is intentional — both represent projected or goal savings. The distinction is whether work on the project has started.

Metric definition

The following attributes define the Planned Savings (Current Year) metric:

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Attribute	Detail
Metric name	Planned Savings (Current Year)
Pipeline state	Planned
Savings field	Targeted savings
Date range	User-specified (typically the current calendar year)
Proration	Yes — overlap-based proration
Used in	Savings by Type chart on the analytics dashboard

How planned savings differs from hard savings and cost avoidance

Aspect	Hard Savings / Cost Avoidance YTD	Planned Savings
Pipeline state	Closed Complete	Planned
Savings field	Annual hard savings / Annual cost avoidance	Targeted savings
What it represents	Actual achieved savings	Future projected savings

Note: Planned projects have not yet completed, so only the savings target is available. This is why the **Targeted savings** field is used instead of the **Annual hard savings** or **Annual cost avoidance** fields.

How Planned Savings Are Calculated

The Planned Savings metric is calculated month by month across the selected date range and then aggregated for the Savings by Type chart on the analytics dashboard.

- **Receive the date range**: The dashboard passes a date range—typically the current calendar year—along with any active filters (such as department or category).
- **Break the range into monthly intervals**: The system splits the full date range into individual month windows (for example, January 1–31, February 1–28, and so on through December).
- **For each month, identify qualifying projects**: The system queries the pipeline project table for projects in **Planned** state where the project has a savings start date and a savings end date, the savings period overlaps with the month window, and the project has a non-zero **Targeted savings** value.
- **Prorate each project's savings against the month window**: For each qualifying project, the system calculates the overlap between the project's savings period and the month window, then applies the proration formula. Per-day rate equals **Targeted savings** divided by project duration (capped at 365 days). Prorated savings equals per-day rate multiplied by overlap days.
- **Sum the monthly totals**: The prorated savings for all qualifying projects in each month are added together to produce a monthly planned savings figure.
- **Aggregate across months**: The monthly totals are combined into a time-series dataset used to render the Savings by Type chart on the analytics dashboard.

Proration formula

Prorated Savings = (Targeted Savings ÷ min(Project Days, 365)) × Overlap Days.

Applied per month window across the selected date range.

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Example calculation

The following scenario demonstrates how Planned Savings is calculated for two planned pipeline projects during the date range of January 1 to December 31, 2024:

Pipeline	State	Targeted Savings	Savings Start	Savings End
PIPE-201 (Q3 Vendor Review)	Planned	$180,000	Jul 1, 2024	Dec 31, 2024
PIPE-202 (Cloud Migration Savings)	Planned	$500,000	Jan 1, 2024	Dec 31, 2025

PIPE-201: Fully within the year (H2 project)

- Project duration = 184 days
- Overlap with range = 184 days (project falls entirely within the year)
- Per-day rate = $180,000 ÷ 184 = $978.26/day
- Prorated savings = $978.26 × 184 = $180,000.00

PIPE-202: Multi-year project (365-day cap applies)

- Project duration = 730 days — exceeds 385 days
- Overlap with range = 365 days (full year 2024)
- Per-day rate = $500,000 ÷ **365 (capped)** = $1,369.86/day
- **Prorated savings = $1,369.86 × 365 = $500,000.00**

Final aggregation

The final aggregation sums the prorated values:

Pipeline	Prorated Planned Savings
PIPE-201	$180,000.00
PIPE-202	$500,000.00
Total Planned Savings (Current Year)	**$680,000.00**

Active Savings (Current Year) metric calculation

Active Savings (Current Year) shows the targeted savings from pipeline projects that are currently in progress. This metric represents in-flight work where final realized savings are not yet known.

Active Savings (Current Year) reads from the **Targeted savings** field because work is still underway and the final realized savings are not yet known. The difference from Planned Savings is the pipeline state; Active Savings (Current Year) includes projects only in Work in Progress state.

Note: Both Active Savings and Planned Savings read from the **Targeted savings** field. This is intentional — both represent projected or goal savings. The distinction is whether work on the project has started.

Metric definition

The following attributes define the Active Savings (Current Year) metric:

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Attribute	Detail
Metric name	Active Savings (Current Year)
Pipeline state	Work in Progress
Savings field	Targeted savings
Date range	User-specified (typically the current calendar year)
Proration	Yes — overlap-based proration
Used in	Savings by Type chart on the analytics dashboard

How Active Savings are calculated

The calculation follows the same steps as Planned Savings, with the state filter set to **Work in Progress** instead of Planned.

- **Receive the date range.** The dashboard passes a date range — typically the current calendar year — along with any active filters.
- **Break the range into monthly intervals.** The system splits the full date range into individual month windows.
- **For each month, identify qualifying projects.** The system queries the pipeline project table for projects in **Work in Progress** state where:
  - The project has a savings start date and a savings end date.
  - The savings period overlaps with the month window.
  - The project has a non-zero Targeted savings value.
- **Prorate each project's savings against the month window.** The system applies the same proration formula used across all four metrics:
  - Per-day rate = Targeted savings ÷ project duration (capped at 365 days)
  - Prorated savings = per-day rate × overlap days
- **Sum the monthly totals.** The prorated savings for all qualifying projects in each month are added together.
- **Aggregate across months.** The monthly totals are combined into a time-series dataset for the Savings by Type chart on the analytics dashboard.

Proration formula

Prorated Savings = (Targeted Savings ÷ min(Project Days, 365)) × Overlap Days.

Applied per month window, for Work in Progress projects only.

Example calculation

The following scenario demonstrates how Active Savings is calculated for three active pipeline projects during the date range of January 1 to December 31, 2024:

Pipeline	State	Targeted Savings	Savings Start	Savings End	Project Days
PIPE-301 (Ongoing Vendor Negotiation)	Work in Progress	$240,000	Mar 1, 2024	Aug 31, 2024	184

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Pipeline	State	Targeted Savings	Savings Start	Savings End	Project Days
PIPE-302 (Fleet Cost Reduction)	Work in Progress	$365,000	Jan 1, 2024	Dec 31, 2024	365
PIPE-303 (Strategic Sourcing)	Work in Progress	$1,000,000	Jun 1, 2023	May 31, 2025	730

PIPE-301: Mid-year short project

- Project duration = 184 days
- Overlap with range = 184 days (project falls entirely within the year)
- Per-day rate = $240,000 ÷ 184 = $1,304.35/day
- **Prorated savings = $1,304.35 × 184 = $240,000.00**

PIPE-302: Full year alignment

- Project duration = 365 days
- Overlap with range = 365 days (perfect alignment)
- Per-day rate = $365,000 ÷ 365 = $1,000.00/day
- **Prorated savings = $1,000.00 × 365 = $365,000.00**

PIPE-303: Multi-year project (365-day cap applies)

- Project duration = 730 days (Jun 2023 – May 2025) — **exceeds 365 days**
- Overlap with range = 365 days (full year 2024)
- Per-day rate = $1,000,000 ÷ **365 (capped)** = $2,739.73/day
- **Prorated savings = $2,739.73 × 365 = $1,000,000.00**

Final aggregation

The final aggregation sums the prorated values:

Pipeline	Prorated Active Savings
PIPE-301	$240,000.00
PIPE-302	$365,000.00
PIPE-303	$1,000,000.00
Total Active Savings (Current Year)	**$1,605,000.00**

Understanding punchout

Punchout is a technology that connects a buyer's eProcurement application to third-party supplier eCommerce sites. This connection enables direct catalog access while maintaining procurement controls.

Punchout enables a buyer's employees to shop on third-party supplier eCommerce sites. They complete their purchase in their organization's eProcurement application, where approval workflows can be applied and spending can be tracked.

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In level 1 punchout, only the search functionality of the punchout catalog is available. Upon redirection to the third-party punchout supplier's site, the shopper adds items to their cart. They are then redirected to ServiceNow to complete the order details.

With level 2 punchout catalogs, customers can search and order products directly in the procurement system. Redirection to the punchout system is not required.

Punchout configuration in SPO

Punchout configuration enables third-party suppliers to integrate their catalogs with SPO.

The following configuration is required in SPO to enable punchout:

- Enable suppliers for punchout: Confirm that suppliers are enabled for punchout. For each punchout supplier, a supplier record must be created, and select the **PunchOut** check box.
- Configure the Third Party Registration [sn_spend_intg_third_party_registration] table: Depending on the type of integration, configure one of the following configuration options:
  - cXML PunchOut: If the record is marked for cXML PunchOut support, the cXML PunchOut Setup related list provides options for configuring various connection details.
  - API Exchange: If the record is marked for API Exchange, the API Configuration related list provides options for setting up API-based integration with punchout systems.
  - SpendInt API: If the record is marked for SpendInt API, configuration options for data load are available. This supports pre-punchout configuration for integrations.

For more information, see Configure punchout for third-party site purchases.

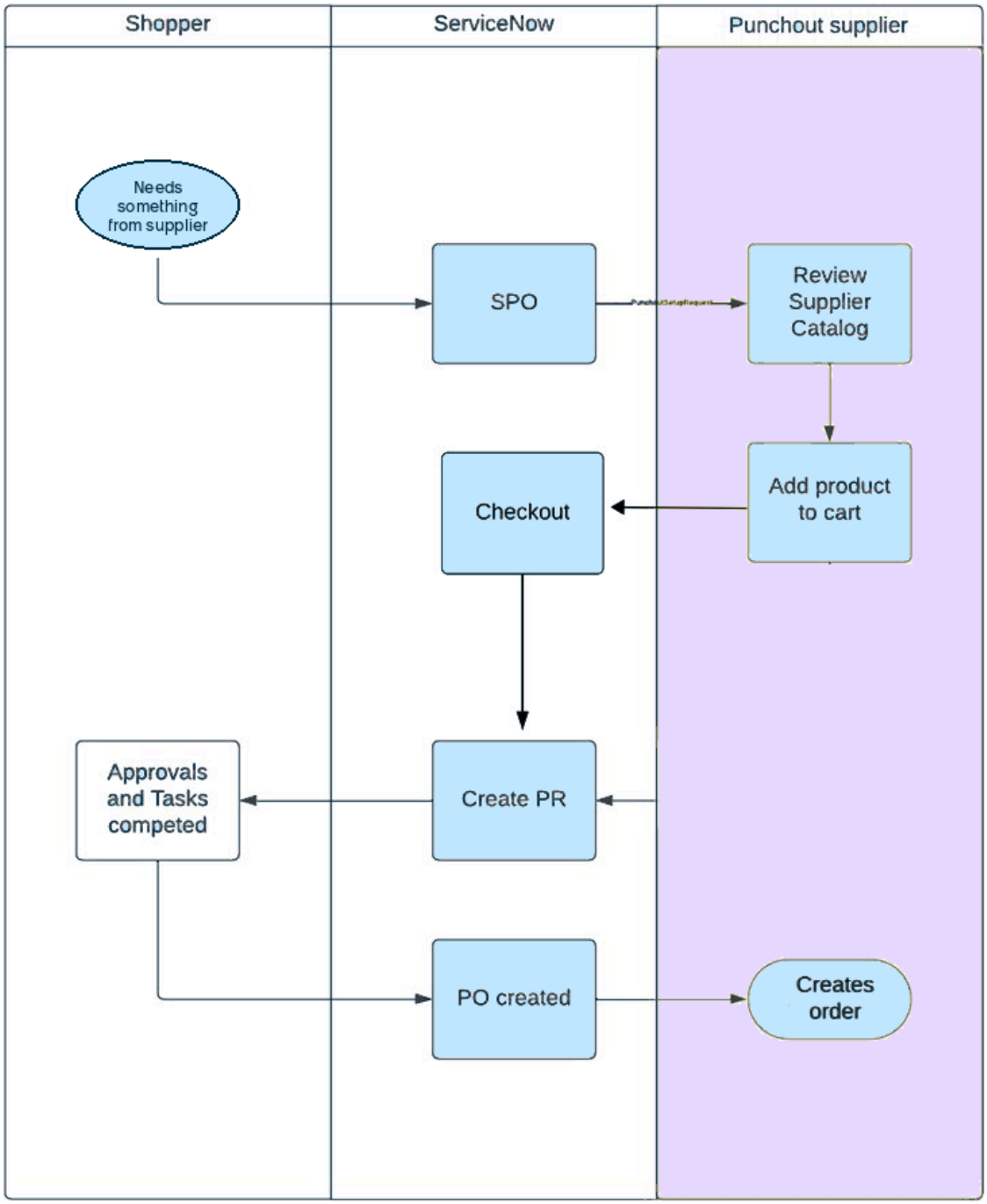
How L1 punchout works

In the Level 1 (L1) punchout, SPO and the punchout supplier communicate using the cXML protocol.

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L2 punchout flow

The following figure illustrates the L1 PunchOut flow.

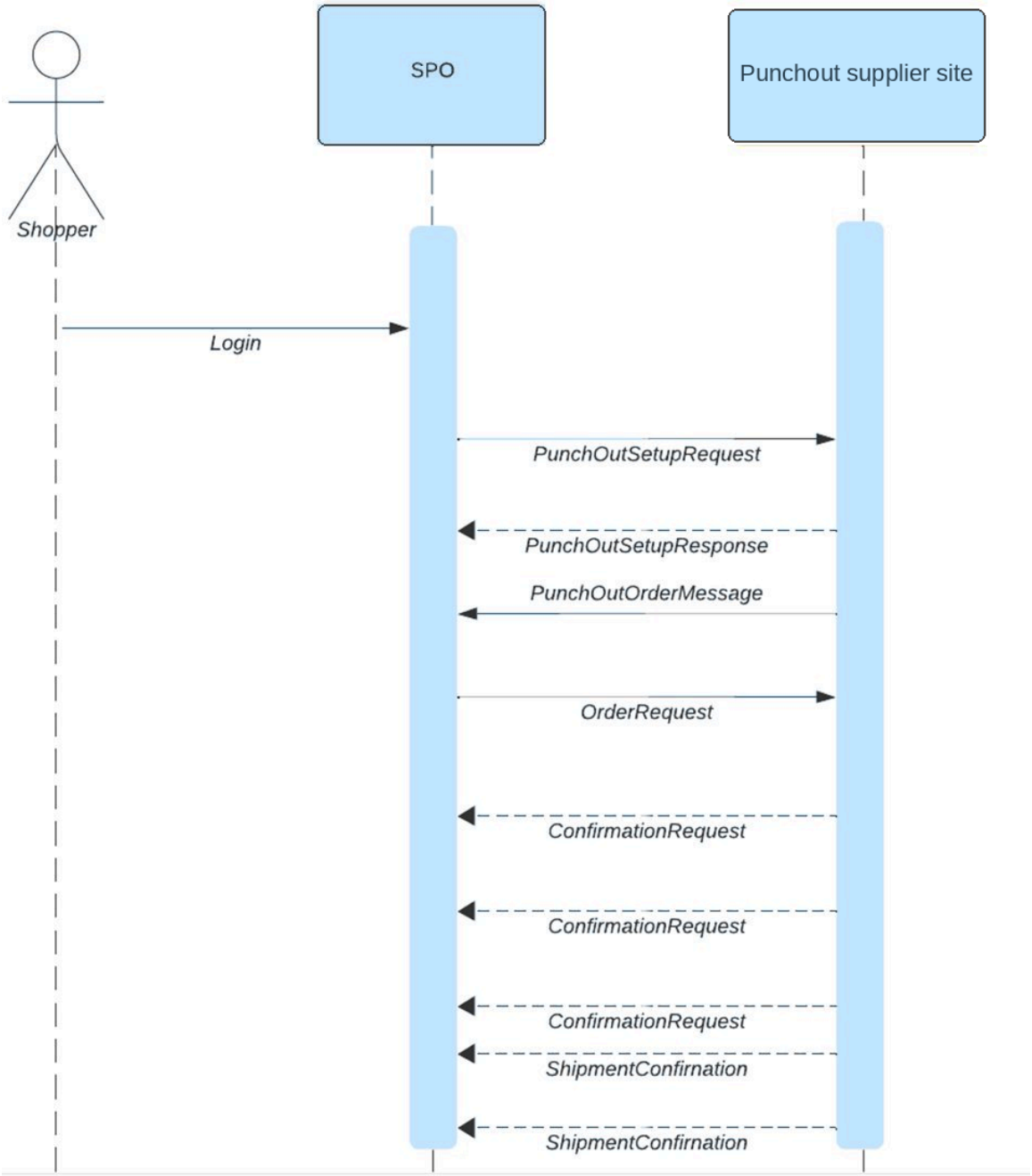


Communication between SPO and punchout supplier for Level 1 punchout

The following figure illustrates the interaction between SPO and the punchout supplier for a Level 1 PunchOut.

Note: This flow is also applicable to other PunchOut systems; however, the content of the cXML payloads may vary depending on the provider.

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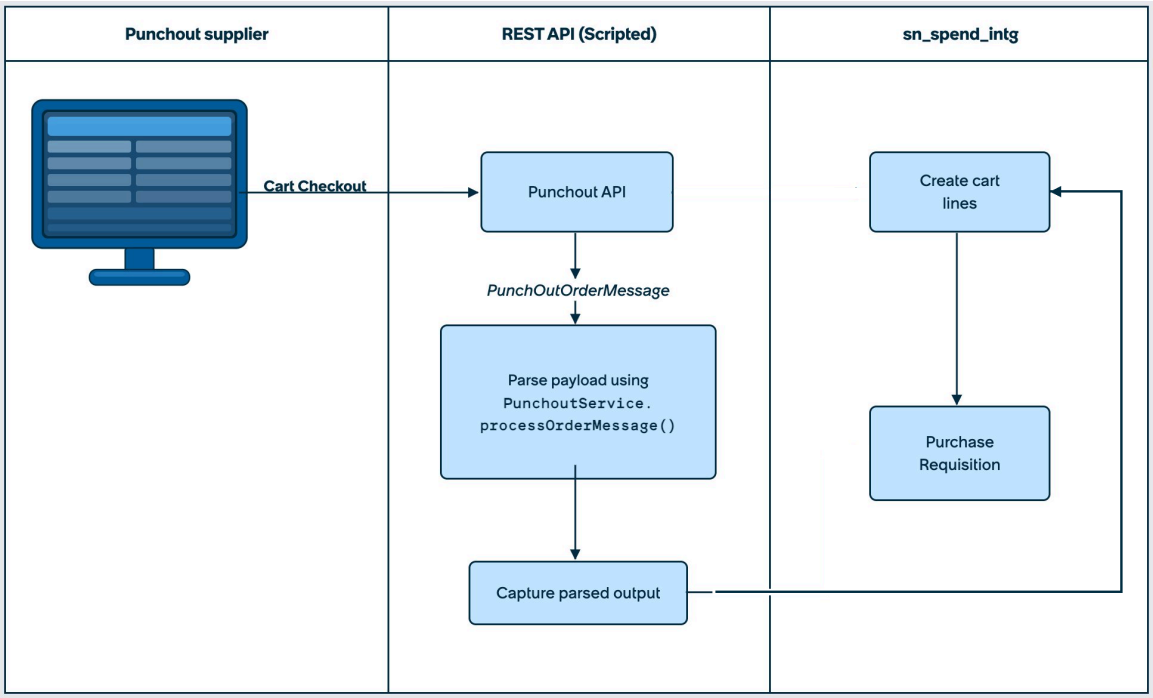
Cart checkout from the punchout supplier site

The cart checkout flow involves the following:

- When a user checks out the cart on the punchout supplier site, the punchout supplier (or other PunchOut systems) sends a PunchOutOrderMessage cXML payload to the REST endpoint exposed by SPO.
- The details of this endpoint are included in the PunchOutSetupRequest payload, enabling the punchout supplier to know where to send the order request.
- After SPO receives the PunchOutOrderMessage payload, it processes the information and creates the corresponding SPO cart lines.
- The user then reviews the cart in SPO and proceeds to checkout. Upon successful checkout, a purchase requisition (PR) is created.

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The following figure illustrates this flow:



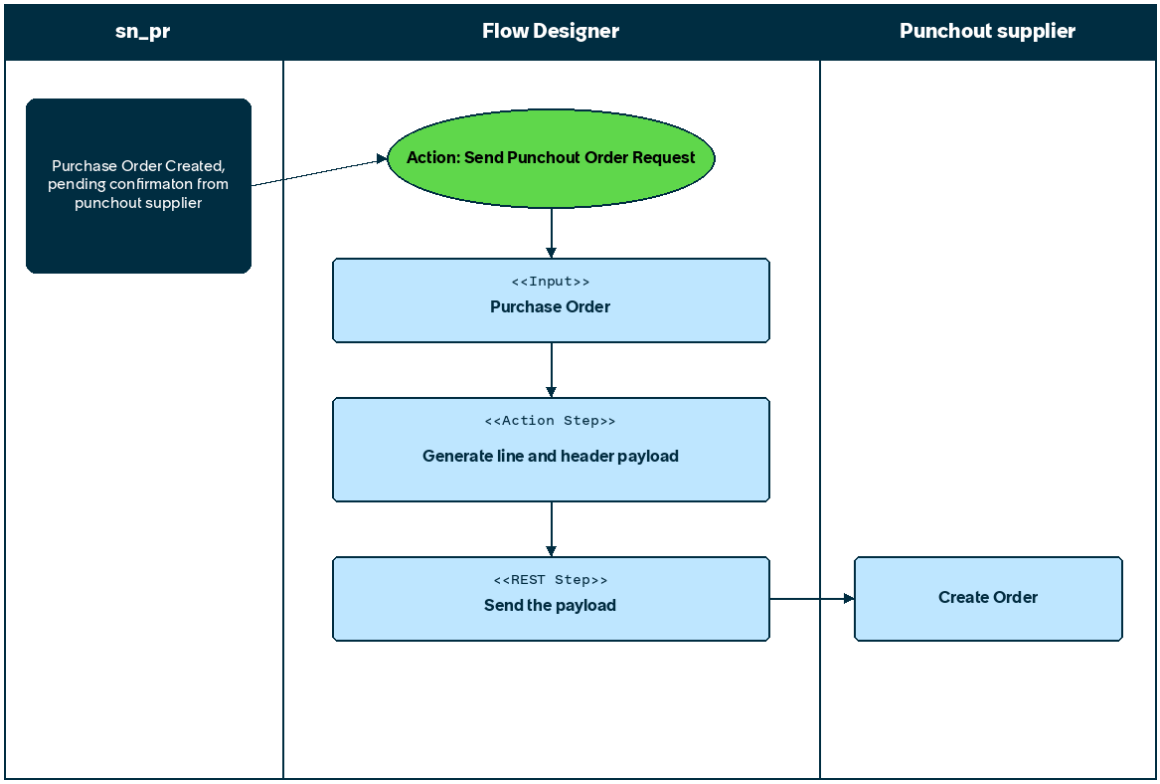
Sending purchase order to punchout system

Sending purchase order information to the punchout supplier system involves the following:

- When a PR is approved and a PO is created, SPO needs to send OrderRequest cXML payload to the punchout supplier system.
- The flow action Send Punchout Order Request sends the PO to the punchout system.
- The punchout supplier creates the order and sends confirmation.

The following figure illustrates this flow:

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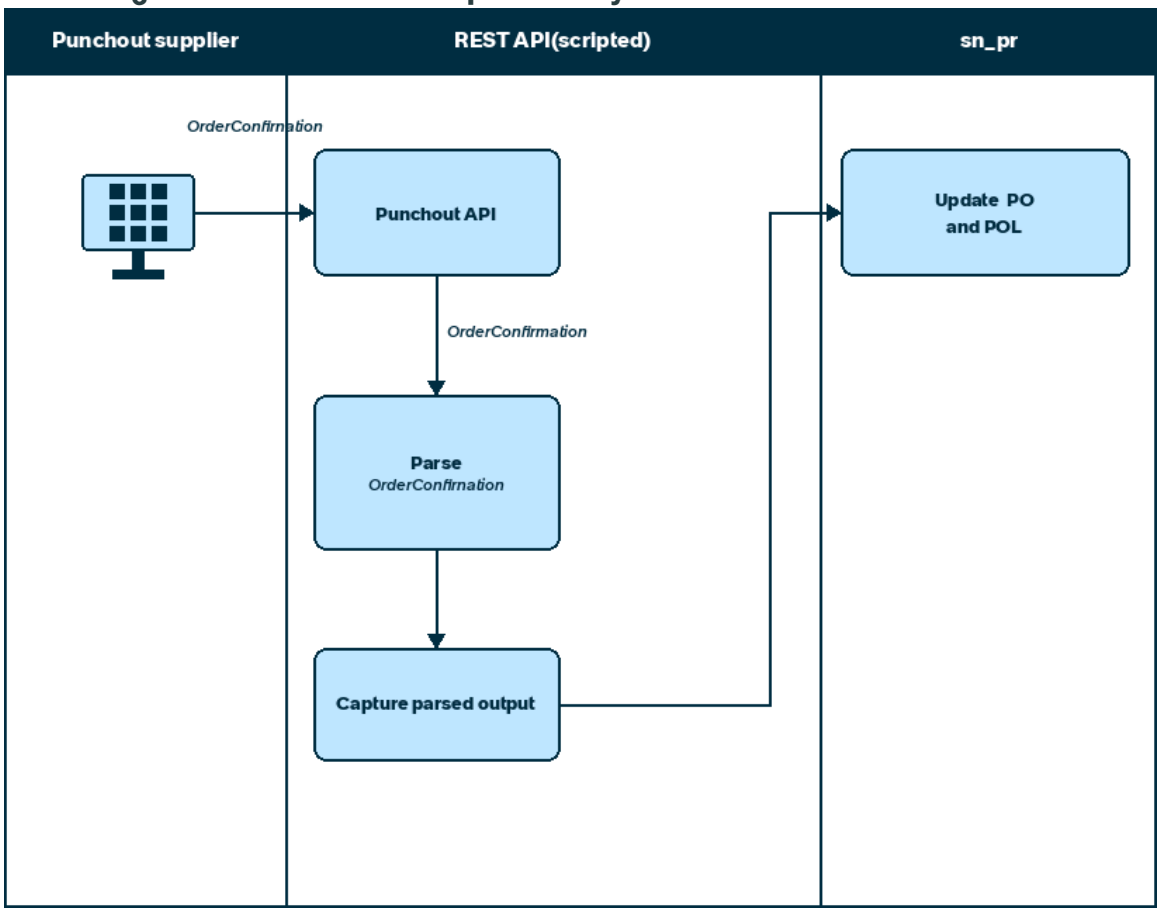
Processing order confirmation and shipping confirmation from punchout supplier system

The punchout supplier sends the order confirmation payload to the Order Confirmation URL, which is configured in the punchout supplier's system. Similarly, for each order line, the punchout supplier may optionally send a shipping confirmation payload to the Shipping Confirmation URL. For more information, see Providing Order and Shipping Confirmation URLs to Punchout Suppliers.

The following figure illustrates this flow:

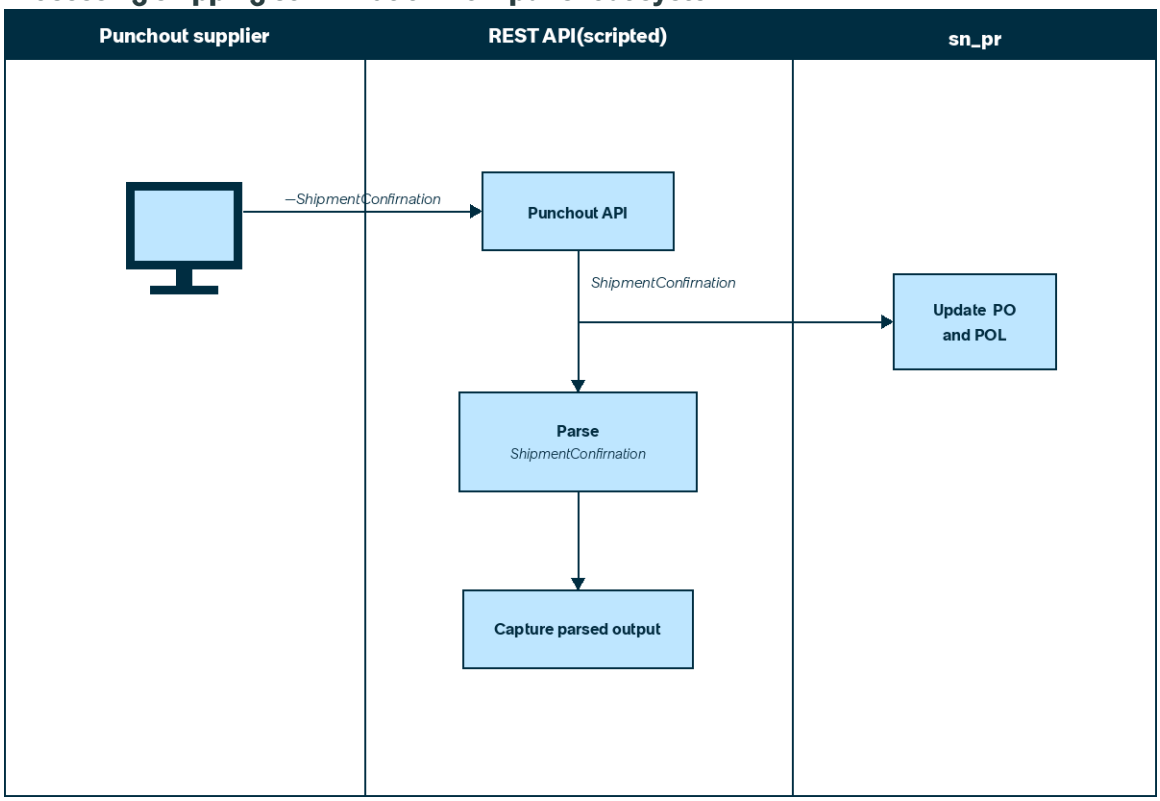
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Processing order confirmation from punchout system



The following figure illustrates this flow:

Processing shipping confirmation from punchout system



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Establishing connection between SPO and the supplier punchout system

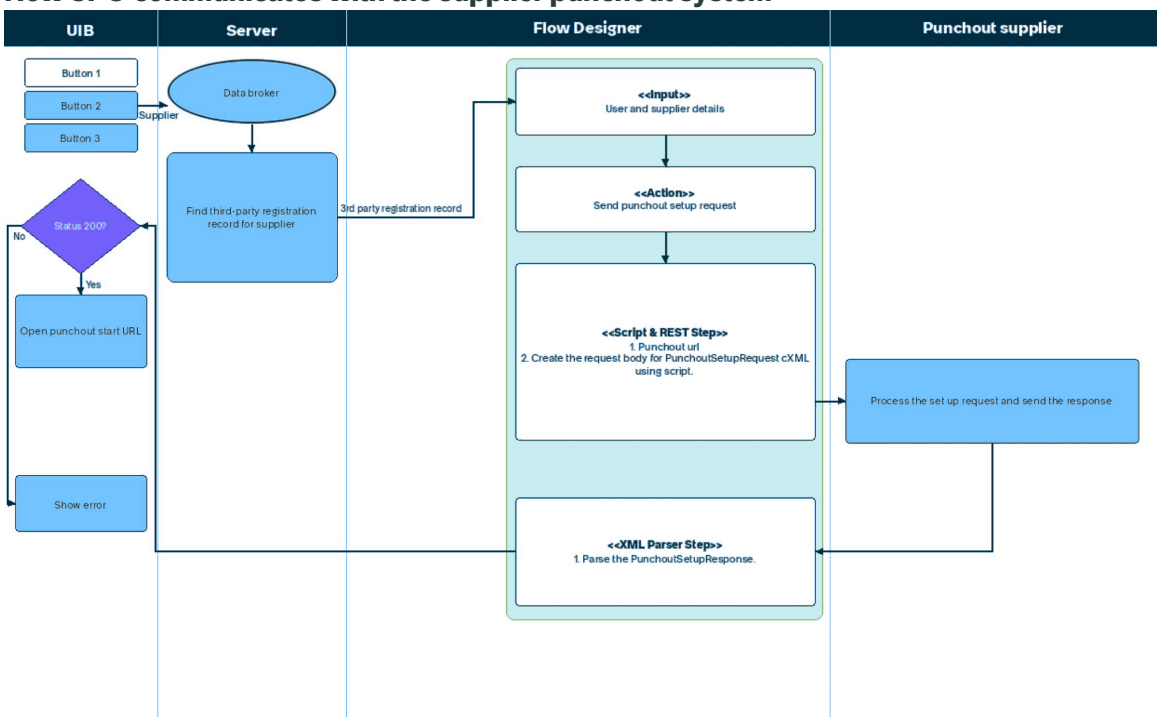
SPO and the supplier punchout system use PunchOutRequest and PunchOutResponse payloads to establish the connection.

The PunchOut system returns a PunchOutResponse, which contains the start URL for the PunchOut session. The SPO endpoint parses this response and opens the URL in a new tab. This parsing can be implemented using the XML Parser action step.

Note: The PunchOutRequest and PunchOutResponse payloads are expected to follow the same structure across all PunchOut systems.

The following figure illustrates the connection flow:

How SPO communicates with the supplier punchout system



How L2 punchout works

Level 2 (L2) PunchOut enables buying organizations to search for and discover PunchOut items directly within their procurement application, eliminating the need to search each supplier's site individually.

Key APIs used in L2 punchout

- Search API: Enables SPO to query multiple PunchOut systems and display product listings within the application.
- Product API: If supported by the PunchOut system, this API allows SPO to retrieve detailed product information.
- Order API: If supported by the PunchOut system, this API enables users to complete the checkout process within SPO itself.

Multi-supplier support

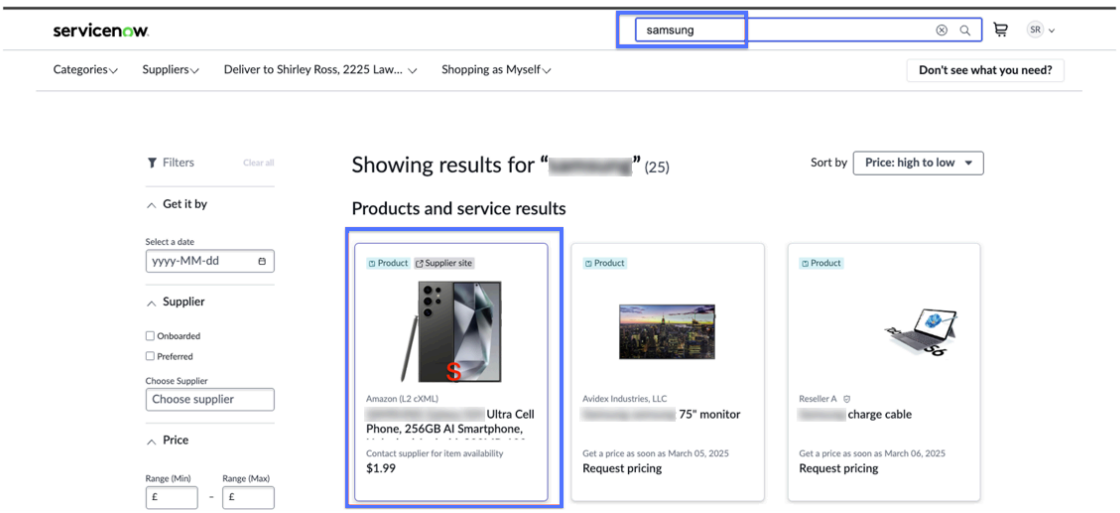
You can configure SPO with multiple PunchOut endpoints. For more information, see Punchout configuration in SPO.

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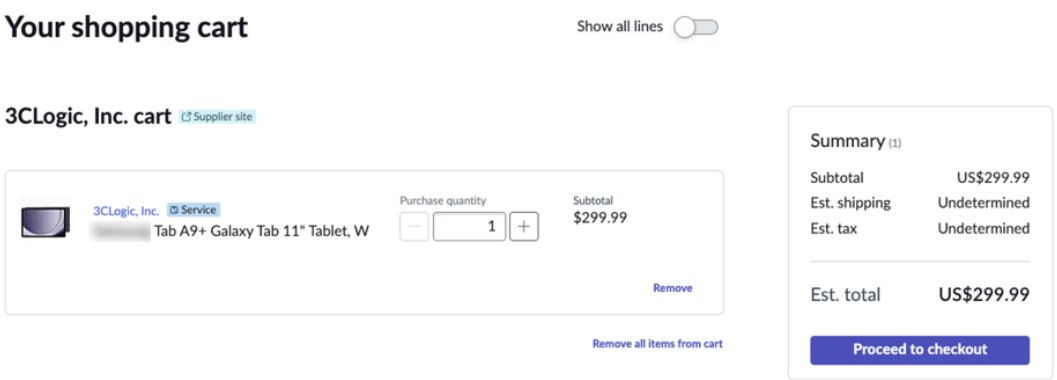
When a search is initiated, SPO queries all configured systems and presents a consolidated set of results to the user.

Search and checkout flow

- Users can search for items and view a consolidated list of products returned from all configured PunchOut systems.



- Selected products are added to the cart, and checkout is completed within SPO. Upon checkout, a Purchase Requisition (PR) is created. Once approved, a Purchase Order (PO) is generated and synced to the corresponding PunchOut system.



L2 punchOut flow

The Level 2 PunchOut flow includes the following steps:

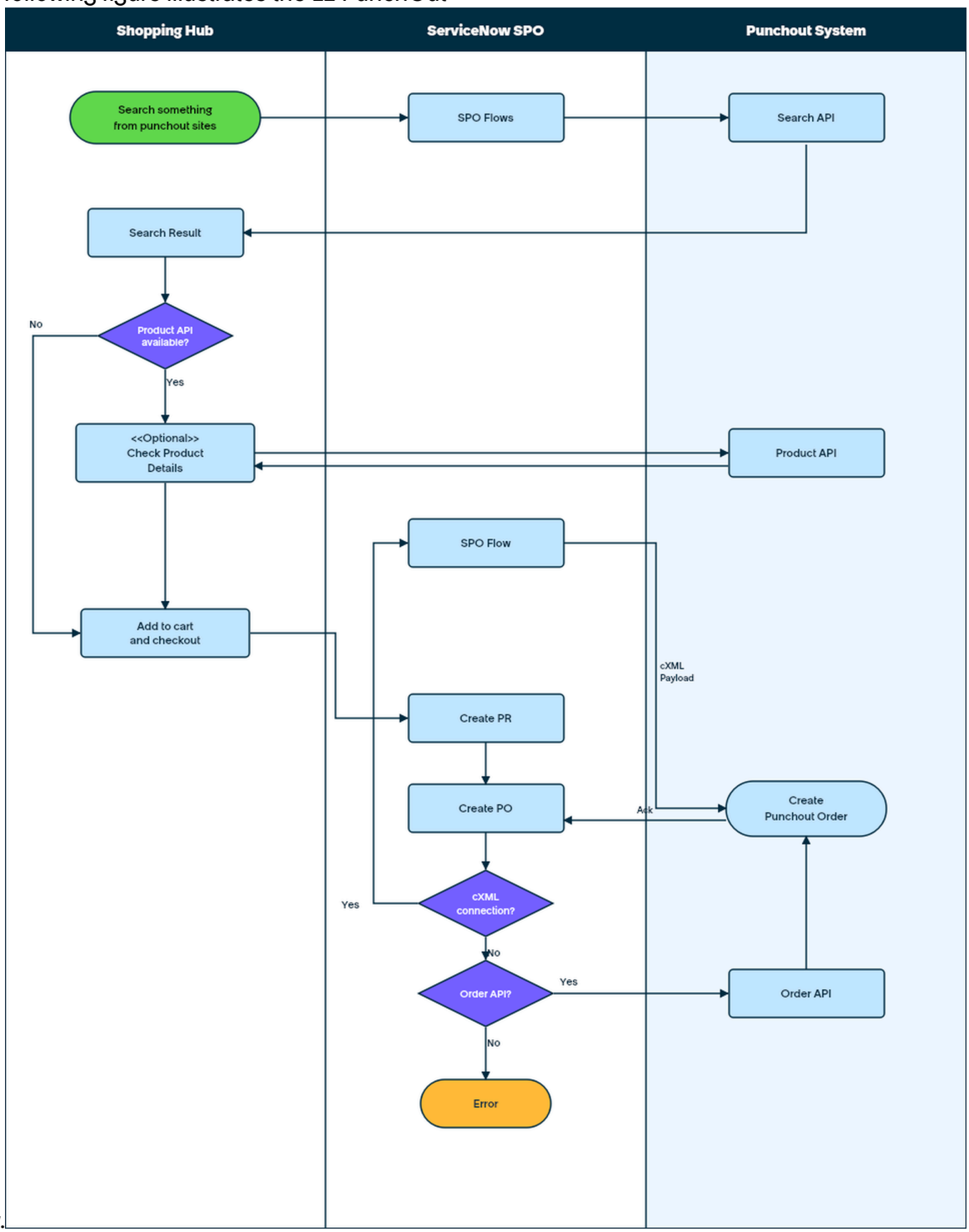
- When a search term is entered, SPO's backend queries all configured search endpoints, and the resulting product list is displayed in ShoppingHub.
- If any of the returned payloads lack required mandatory fields, the corresponding results are excluded from further processing.
- If the PunchOut system supports the Product API, detailed product information can be retrieved from the supplier.

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- After products are added to the cart and the user checks out, SPO creates a Purchase Requisition and, upon approval, a Purchase Order.
- The PO is then synced with the PunchOut system using either of the following:
  - cXML payloads, if the supplier supports a cXML order endpoint.
  - Order API, if the supplier supports API-based order submission.
- The target PunchOut system is determined based on the supplier information in the PO. SPO retrieves the relevant third-party configuration from the Third-Party Registration table.
- An extension point, sn_spend_intg.ThirdPartySystemApiExtension, is available to support integration with various PunchOut systems:
  - Users must configure PunchOut system details in the Third-Party Registration table.
  - Users must also implement the above extension point to enable integration with specific PunchOut systems.

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The following figure illustrates the L2 PunchOut flow.



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.

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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.

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.

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ServiceNow® Mobile

To configure AI Search for the ServiceNow® Mobile, see Advanced text search in mobile.

Service Portal or Employee Center

To configure AI Search for the Service Portal or EC so that your users can take advantage of this powerful search tool, see AI Search in Service Portal.

Virtual Agent

Virtual Agent uses AI Search to return search results in bot conversations when there are no relevant topics to display. For more information, see Virtual Agent integration with AI Search.

Universal Request in Sourcing and Procurement Operations

Universal Request (UR) in Sourcing and Procurement Operations enables employees to submit procurement-related requests through Employee Center, even when a request requires collaboration across multiple departments or teams. After submission, a routing agent creates a procurement case and routes it to the appropriate fulfillers for resolution.

Plugin

To enable Universal Request in Sourcing and Procurement Operations, install the Universal Request for Source-to-Pay Operations plugin (sn_fsc_ur_common). For more information, see Install Universal Request for Sourcing and Procurement Operations.

Key stakeholders

- Employees submit procurement-related requests by creating Universal Requests in Employee Center.
- Routing agents are tier-1 agents who manage Universal Requests and procurement cases. Routing agents can view, update, transfer, and close Universal Requests, and create procurement cases from Universal Requests.

To create routing agents, add users to the Source Operations Universal Request Group. For more information, see Universal Request roles and groups and Assign roles to UR users.

Universal Request workflow

1. An employee submits a Universal Request from Employee Center.

   For more information, see Create a Universal Request from the Supplier Collaboration Portal.

2. A routing agent reviews the request and routes it to the appropriate team based on the short description and additional details provided.
3. The routing agent creates a procurement case as the primary ticket for resolution.

   For more information, see Create a procurement case from a Universal Request.

4. When **Need resolution review** is enabled, the routing agent reviews the resolution and determines the next steps:

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- Accepts the resolution: The Universal Request is marked as **Closed**.
- Rejects the resolution: The procurement case is dissociated from the Universal Request, and a new primary ticket is created for further resolution.

Note: By default, **Need resolution review** is enabled.

Status updates sync automatically to the Universal Request. The employee can track progress on the **Activity** tab in their Universal Request in Employee Center.

Configuring Sourcing and Procurement Operations

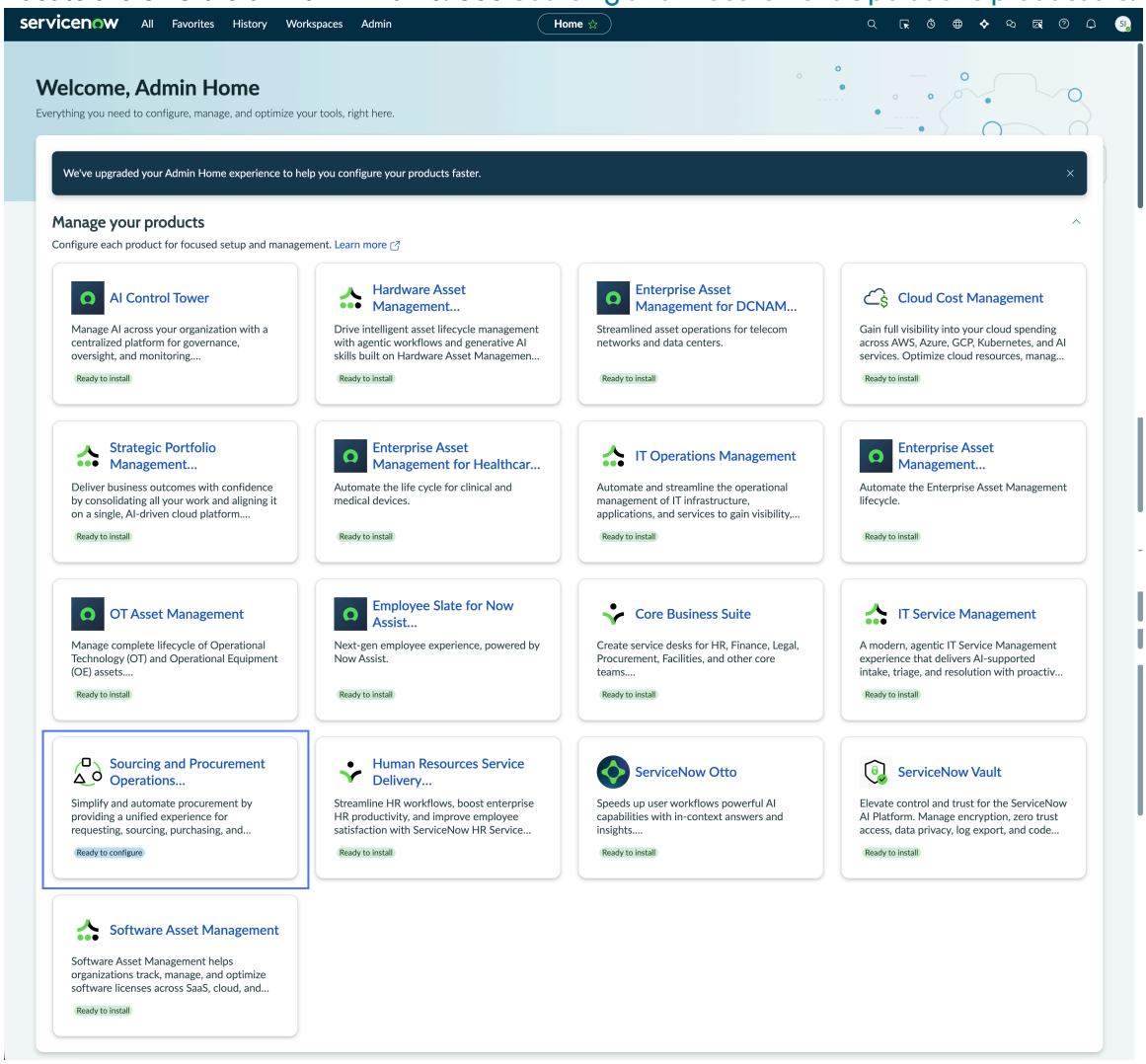
Plan and configure your implementation for Sourcing and Procurement Operations.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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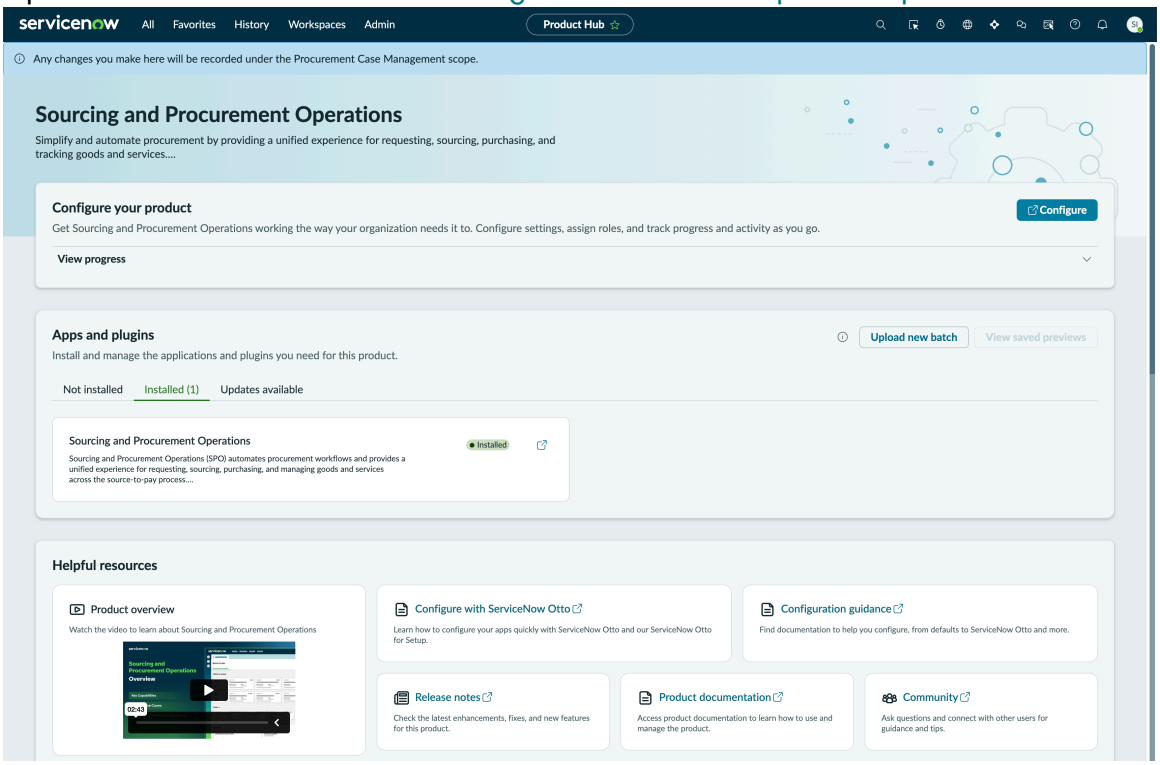
Configuration overview

1. Locate the SPO tile on Admin Home. See Sourcing and Procurement Operations product tile.



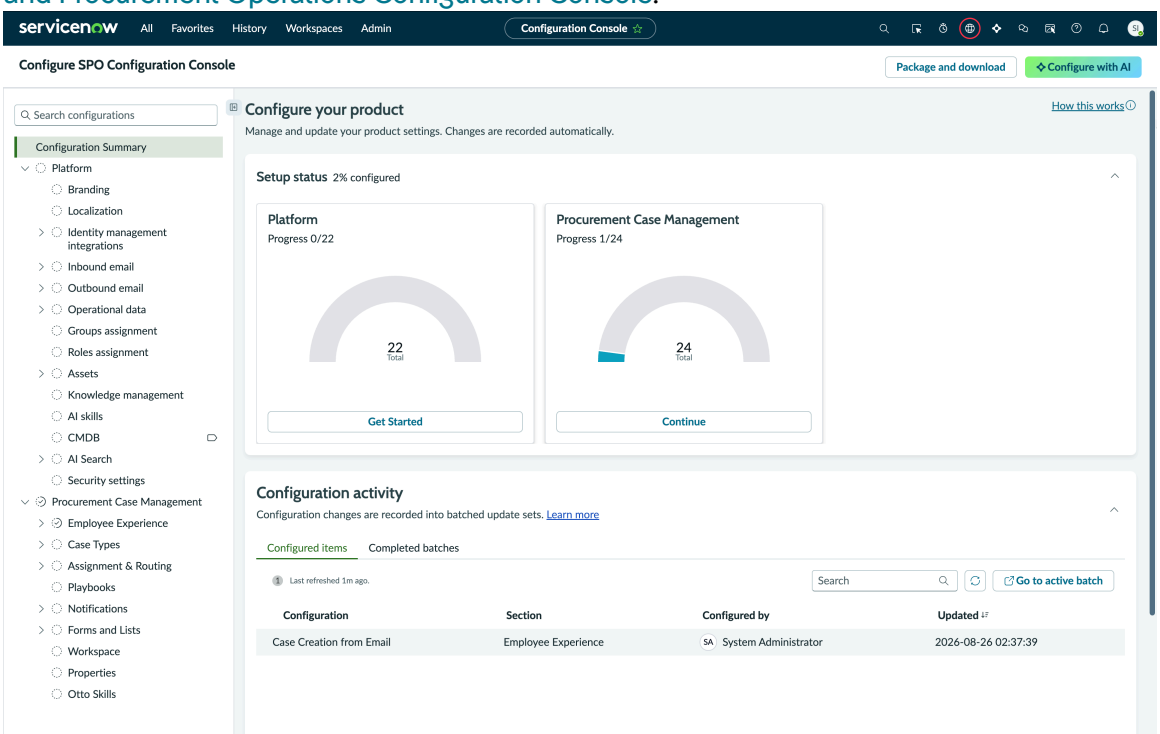
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2. Open the SPO Product Hub. See Sourcing and Procurement Operations product hub.



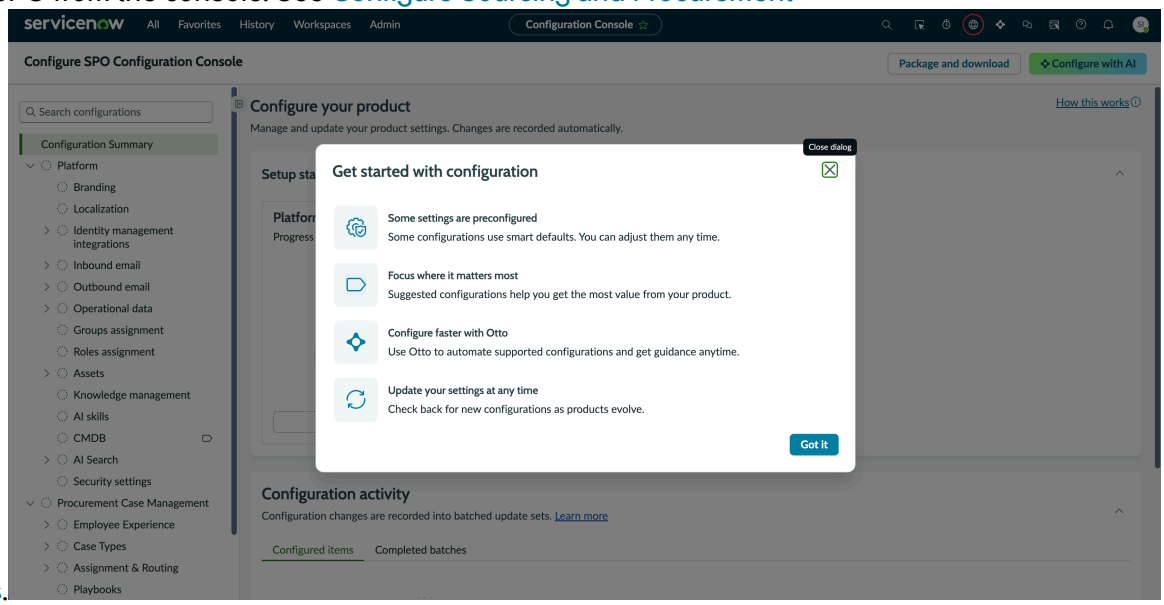
3. Install SPO. See Install Sourcing and Procurement Operations.

4. Open the SPO Configuration Console. See Sourcing and Procurement Operations Configuration Console.



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5. Configure SPO from the console. See Configure Sourcing and Procurement Operations.



6. Configure procurement case management specifically. See Configuring case management in Sourcing and Procurement Operations.

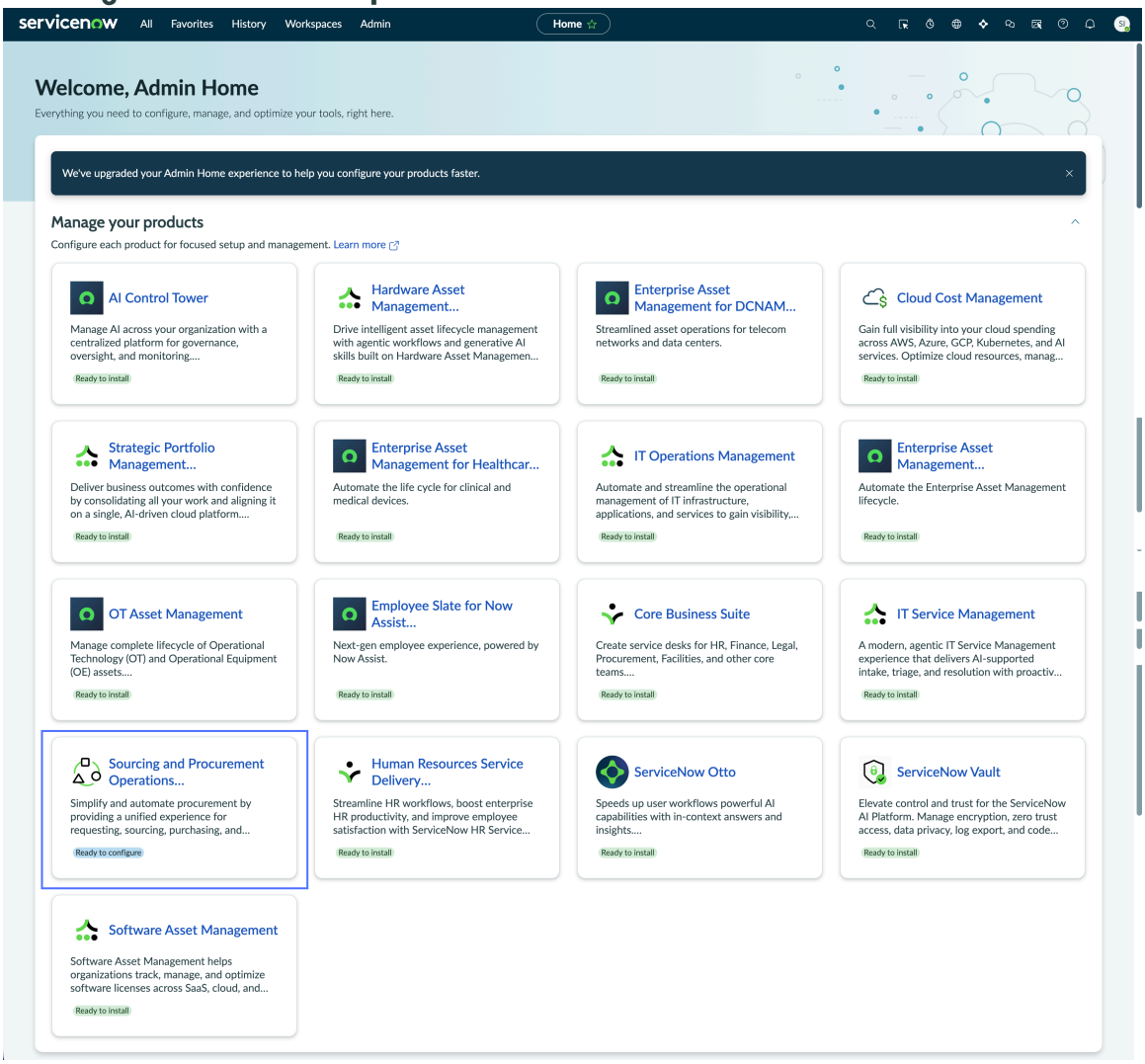
Sourcing and Procurement Operations product tile

The Sourcing and Procurement Operations product tile is an entitlement-driven entry point on Admin Home for admins to discover and install SPO.

The Sourcing and Procurement Operations (SPO) product tile gives admins a single, unambiguous starting point for the SPO deployment journey. The tile appears in the **Manage your products** section of Admin Home, alongside tiles for other entitled products.

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Sourcing and Procurement Operations tile on Admin Home



Tile visibility

The SPO tile displays only when your instance is entitled to at least one SPO resource. If no SPO resource is entitled, the tile does not appear on Admin Home.

Tile content

The tile shows the product name, icon, and short description defined in the SPO product registry record.

Prerequisite application

The ServiceNow Otto for Setup application (sn_ia) must be installed on your instance before the SPO tile can display. If this application is not yet installed, Admin Home shows an installation banner instead, and the SPO tile remains hidden until installation completes. See Set up ServiceNow Otto with ServiceNow Otto for Setup.

For the procedure to install SPO after locating the tile, see Install Sourcing and Procurement Operations.

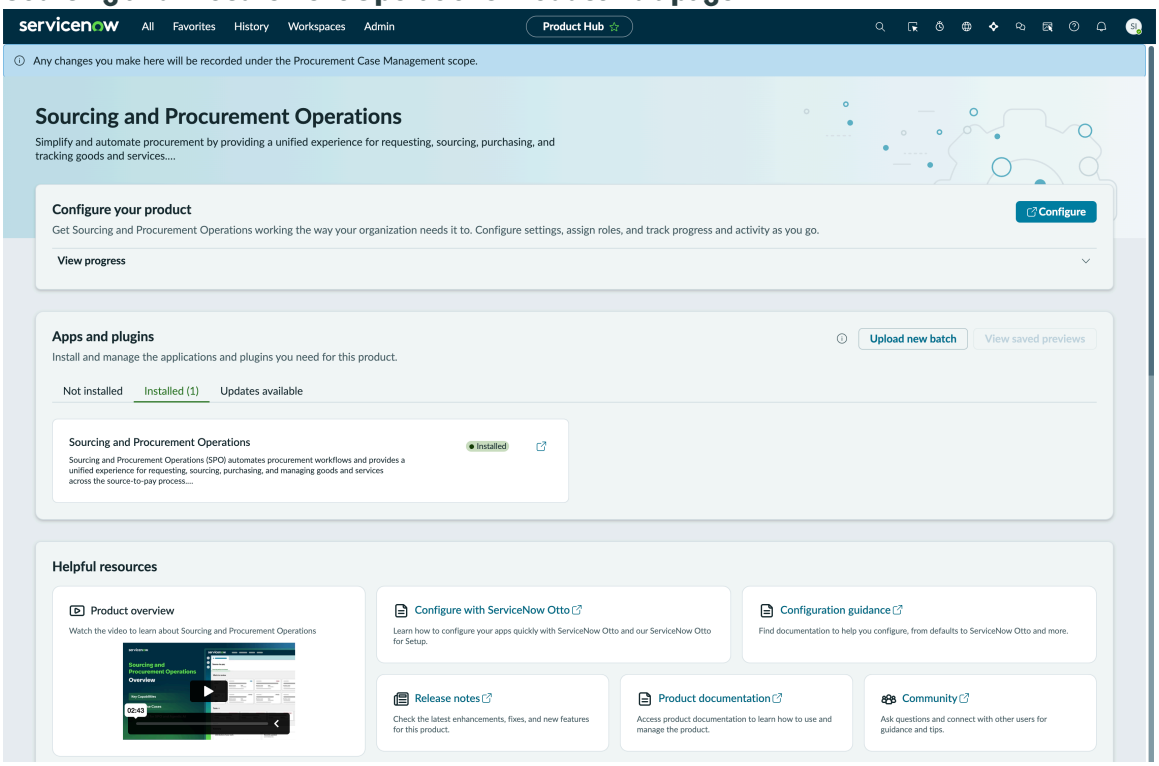
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Sourcing and Procurement Operations product hub

The Sourcing and Procurement Operations Product Hub is the central surface for installing SPO, tracking installation status, and reaching learning resources.

Selecting the SPO tile on Admin Home opens the SPO Product Hub. The hub landing page displays the product name and a brief description, and brings installation, status tracking, and product learning content into a single page.

Sourcing and Procurement Operations Product Hub page



Apps and plugins tabs

The **Apps and plugins** section of the hub organizes SPO resources into three tabs:

- **Not installed** — resources not yet installed on the instance. This tab is selected by default the first time an admin visits the hub.
- **Installed** — resources that have completed installation.
- **Updates available** — installed resources with a newer version available.

A resource card moves from the **Not installed** tab to the **Installed** tab after installation completes, and to the **Updates available** tab when a newer version becomes available.

Helpful resources section

A **Helpful resources** section on the hub remains visible regardless of the current installation state, so admins can access learning content at any point. It provides:

- A product overview video
- A link to configure with SPO using ServiceNow Otto
- Configuration guidance
- A release notes link

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- A product documentation link
- A community link

Configuration redirection

The Product Hub includes a control to configure the installed product, which opens the SPO Configuration Console.

For the procedure to install SPO from the Product Hub, see Install Sourcing and Procurement Operations.

Install Sourcing and Procurement Operations

Install Sourcing and Procurement Operations (SPO) on your instance from the Product Hub.

Before you begin

- The ServiceNow Otto for Setup application (sn_ia) must be installed on your instance. See Set up ServiceNow Otto with ServiceNow Otto for Setup.
- Your instance must be entitled to at least one SPO resource for the SPO tile to display on admin Home.

Role required: admin

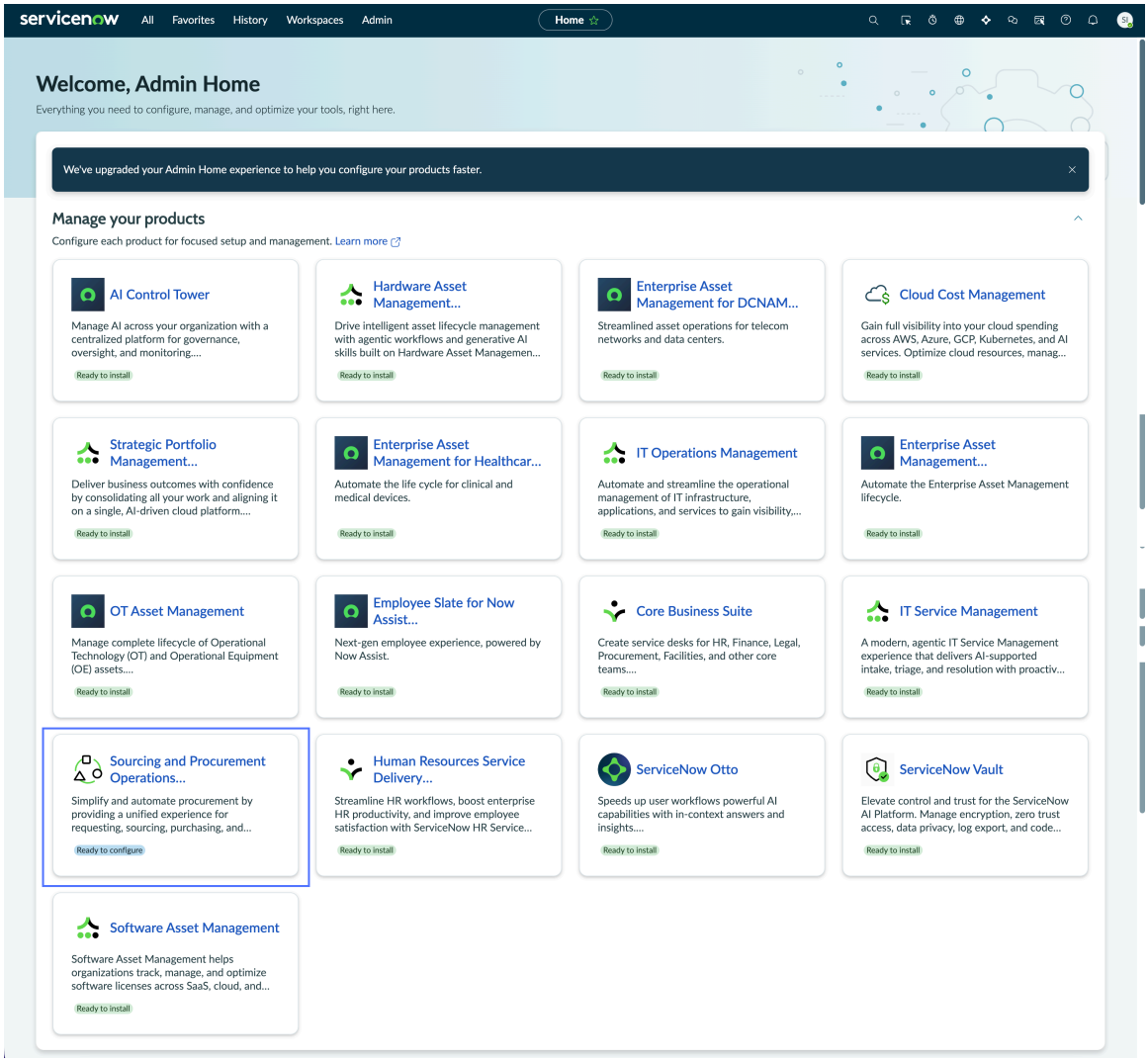
About this task

Sourcing and Procurement Operations applications, plugins, and dependencies are bundled into a single installable resource. Selecting install starts a single-select installation of the full set of SPO applications your instance is entitled to, instead of installing each application individually.

Procedure

1. From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**.
2. From the **Manage your products** section, select Sourcing and Procurement Operations.

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The Product Hub page for Sourcing and Procurement Operations is displayed.

3. In the **Apps and plugins** section, from the **Not installed** tab, select **Install** for Sourcing and Procurement Operations.
   The **Select applications and versions to be installed** page is displayed (step 1 of 2), with all entitled applications and their latest versions preselected.
4. Review the preselected applications and versions, and select **Load demo data** if you want to install sample records along with the applications.

   Load demo data when you first install Sourcing and Procurement Operations on a development or test instance.

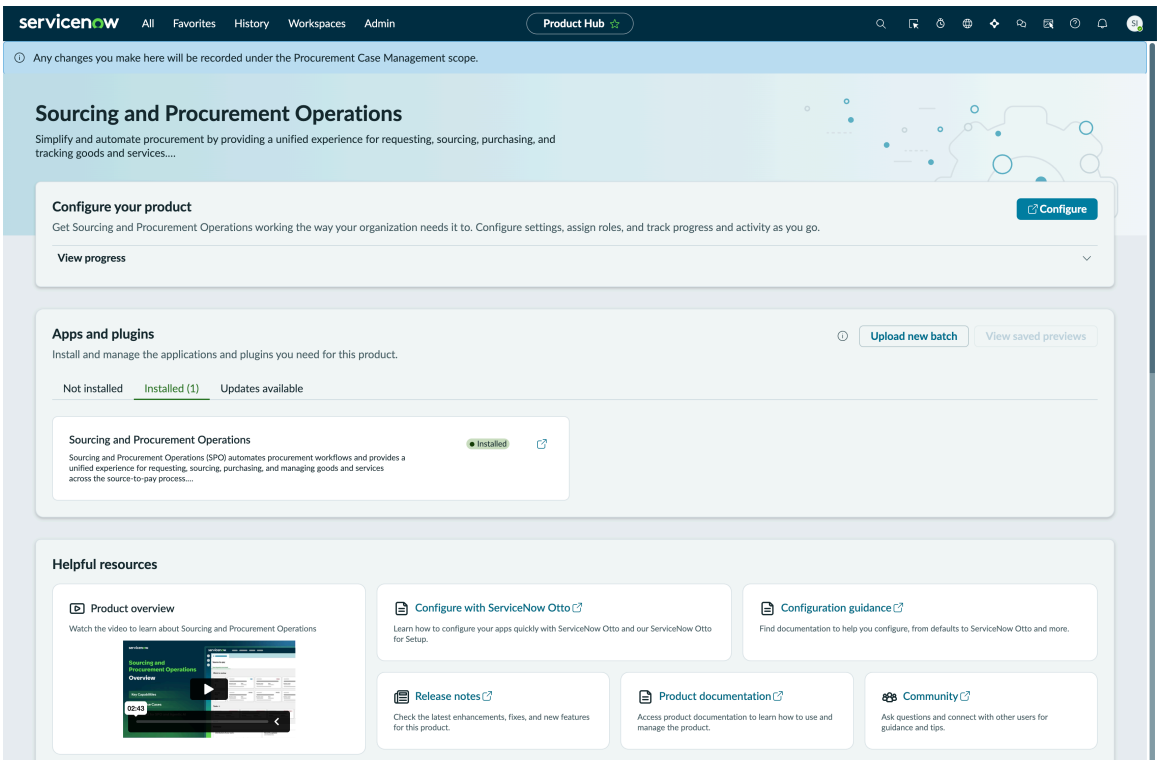
5. Select **Proceed**.
   The **Review Installation Details** page is displayed (step 2 of 2), confirming the number of applications selected.
6. Under **Installation schedule**, select **Install now** or **Install later**, and then select **Install**.

   An **Installation Progress** window opens. All entitled SPO applications, plugins, and dependencies install together. Select **Run in background** to continue working while installation completes.

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Important: Admins can access Application Manager directly through a link during installation. The **Included Applications** count on the Application Manager product page displays as 0 during installation, then updates to reflect the accurate application count after installation completes. For more information, see Sourcing and Procurement Operations tile temporarily disappears from Admin Home during installation [KB3153465].

7. After installation completes, confirm Sourcing and Procurement Operations in the **Installed** tab.



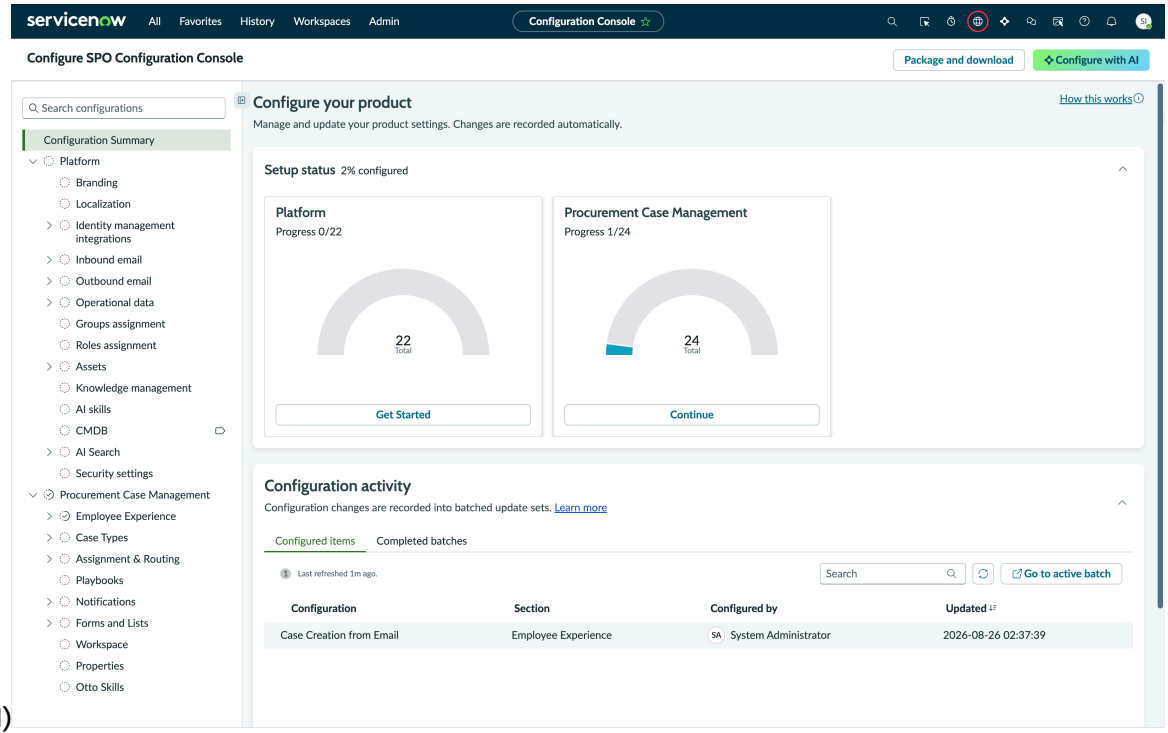
The **Helpful resources** section is always visible and provides the following resources:

- Product overview video
- Link to configure with ServiceNow Otto
- Configuration guidance
- Release notes
- Product documentation
- Community link

8. **Optional:** Start configuring Sourcing and Procurement Operations.

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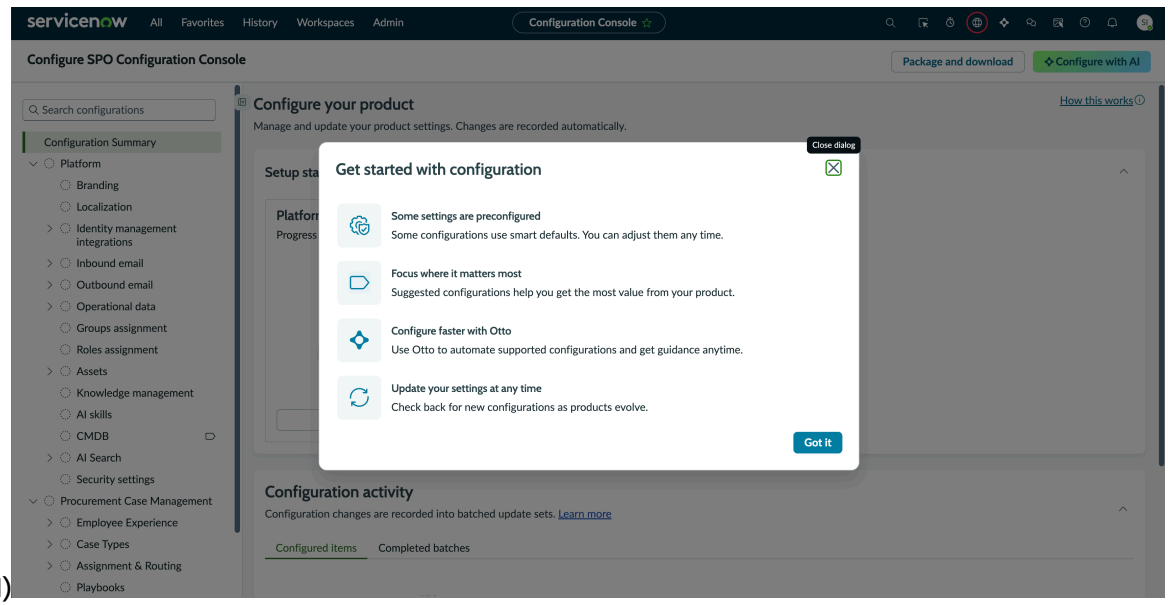
a. Select **Configure** to open the SPO Configuration Console.



(Optional)

The SPO Configuration Console is displayed.

b. In the **Get started with configuration** pop-up window, review the configuration instructions and select **Got it**.



(Optional)

Result

Sourcing and Procurement Operations is installed and ready for configuration.

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.

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Demo data is available for this feature.

Roles installed

Roles installed for Sourcing and Procurement Operations

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 [sn_shop.accounts_payable_viewer]	Read access to purchase orders, invoices, and other task-related objects that arise from purchase order creation.	None
Purchasing Task Owner [sn_shop.purchasing_task_owner]	Access to all purchase orders, requisitions, negotiations,	None

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Roles installed for Sourcing and Procurement Operations (continued)

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

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Roles installed for Sourcing and Procurement Operations (continued)

Role title [name]	Description	Contains roles
	Stage tables and update the Spend category to Product category mappings.	
sn_spend_mgmt.sourcing_category_manager	Can view and access the Category management tab and the Savings dashboard in Spend and Savings Management.	sn_shop.procurement_specialist
sn_spend_pipeline.pipeline_management_admin	Can configure the Pipeline project creation rule decision table to automate the creation of pipeline projects.	decision_table_admin
sn_spend_pipeline.sourcing_pipeline_user	Can view and access the Pipeline management tab.	None

Note: An application-specific admin role enables a user to manage application-level configurations, roles, and access controls. 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 users with the system-level admin role to help prevent system-level admins from viewing sensitive application data via forms, lists, and the UI. For more information, see Application administration.

Scheduled jobs installed

Scheduled jobs installed for Sourcing and Procurement Operations

Scheduled job	Description
[PSM] Approval Due Date Breached	Creates a breached approvals review task if a due date for an approval is breached.

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Scheduled jobs installed for Sourcing and Procurement Operations (continued)

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

Tables installed

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

Tables installed for Sourcing and Procurement Operations

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.

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Tables installed for Sourcing and Procurement Operations (continued)

Table	Description
Attribute Type [sn_shop_attribute_type]	Stores the various types of attributes that are used when creating a product attribute.
Delivery Location [sn_shop_delivery_location]	Stores the delivery location for a given shop line or cart line.
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	Extends the Shop Line table and stores the purchase order line for any purchase order.

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Tables installed for Sourcing and Procurement Operations (continued)

Table	Description
[sn_shop_order_line]	
Order Template [sn_shop_order]	Stores all purchase orders. This is a base table.
Order to Contract Relationships [sn_shop_m2m_order_contract]	Stores the mapping between the purchase order and 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.

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Tables installed for Sourcing and Procurement Operations (continued)

Table	Description
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.

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

Tables installed for Sourcing and Purchasing Automation

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.
Purchase 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.

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Tables installed for Sourcing and Purchasing Automation (continued)

Table	Description
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.
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.
Sourcing Event [sn_shop_negotiation_event]	Stores the sourcing 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.

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Tables installed for Sourcing and Purchasing Automation (continued)

Table	Description
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 [sn_shop_imp_product]	Extends the Import Set Row table. This staging table is used to import supplier products.
Properties [sn_shop_properties]	Stores the 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	Stores the purchasing permission for a user, group, cost center, or department.

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Tables installed for Sourcing and Purchasing Automation (continued)

Table	Description
[sn_shop_covered_user]	
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 [sn_shop_m2m_purchasing_users_covered]	Stores the mapping between the purchasing permission and purchase requisition.
Requisition to Contract Relationships [sn_shop_m2m_requisition_contract]	Stores the mapping between the requisition and contract.
Revision Line [sn_shop_rev_request_line]	Extends the Request Line Template table and stores the revision line for a purchase.
Revision Request [sn_shop_revision_request]	Extends the Purchasing Task table and stores the state of a revision request for a purchase.
Service Acknowledgment [sn_shop_service_acknowledgment]	Stores the acknowledgment tasks of services received.
Shop Line [sn_shop_line]	Stores the order line template and request line template. This is a base table.
Shopper's Top Suppliers [sn_shop_usr_preferred_supplier]	Stores the mapping between the shopper and preferred supplier.
Shopping Control [sn_shop_shopping_control]	Stores the security rules that determine the access of supplier products for a given user.

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Tables installed for Sourcing and Purchasing Automation (continued)

Table	Description
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 [sn_shop_sourcing_out_queue]	Stages the sourcing request for the third-party providers.
Sourcing Request [sn_shop_sourcing_activity]	Stores requests to source for supplier products.
Sourcing Task [sn_shop_sourcing_task]	Extends the Purchasing Task table and stores the tasks that are related to a sourcing request.
Sourcing Vendor [sn_shop_sourcing_vendor]	Stores the mapping between the sourcing vendor code and sourcing vendor name.
Supplier Product [sn_shop_supplier_product]	Stores the supplier products that represent goods or services that can be listed on the portal.
Supplier Product View [sn_shop_supplier_product_view]	Stores the analytics of the number of views for a supplier product.
Supplier Use by Department [sn_shop_dept_supplier_purchase]	Stores the analytics of suppliers that are used by departments.
Supplier Use by Shopper	Stores the analytics of suppliers that are used by shoppers.

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Tables installed for Sourcing and Purchasing Automation (continued)

Table	Description
[sn_shop_user_supplier_purchase]	
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.

Purchasing properties for Sourcing and Procurement Operations

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

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Purchasing properties for Sourcing and Procurement Operations (continued)

Property	Description
	For more information on how the auto-order properties affect purchase order creation, see Purchase requisition auto-order.
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. For more information on how the auto-order properties affect purchase order creation, see Purchase requisition auto-order.
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, do the following:

1. Navigate to **All**.
2. On the left navigation pane, enter `sys_properties_list.do`.

   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**.

Property to automate the edit receipt flow

Enable the `sn_spend_cp.enable_automated_edit_receipt_flow` system property to automate the approval and processing of edit receipt requests without manual intervention.

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The automated process updates the purchase order (PO) and purchase order line (POL) quantities, while also automatically closing the associated procurement case in the Source-to-Pay Workspace.

Role required: sn_shop.shopping_hub_admin and sn_shop.procurement_administrator

This property is enabled by default. However, if this property is disabled, do the following to enable it:

1. Navigate to **All**.
2. On the left navigation pane, enter `sys_properties_list.do`.

   The entire list of properties in the System Properties [sys_properties] table appears.
3. In the Name search field, look for **sn_spend_cp.enable_automated_edit_receipt_flow** and open the system property.

   The system property is enabled by default. The **Value** field displays the default value as **ON**.
4. If the **Value** field shows **OFF**, change it to **ON** to enable this property.
5. Select **Update**.

Properties installed with Finance Common Architecture

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

Properties for Finance Common Architecture

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

Sourcing and Procurement Operations Configuration Console

The SPO Configuration Console guides administrators through configuring SPO in a structured, sequenced set of steps.

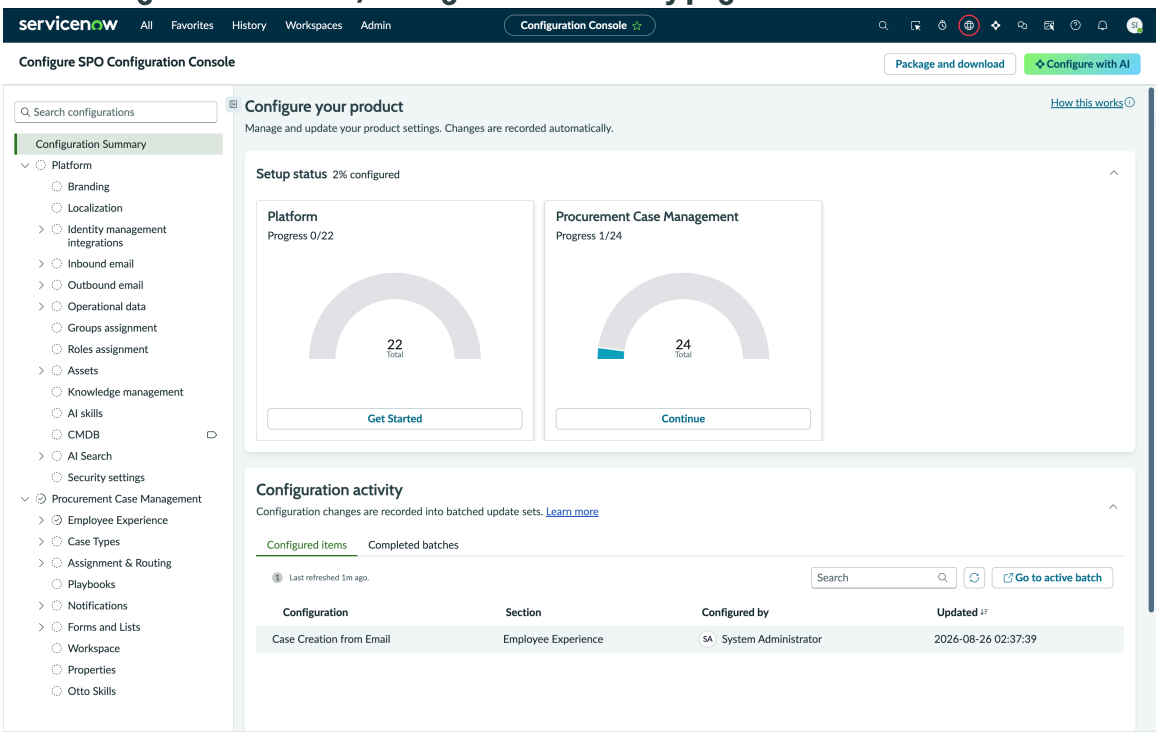
Selecting **Configure** on the SPO Product Hub opens the SPO Configuration Console. The console presents configuration items in a fixed module and sub-module hierarchy in the left navigation pane. Administrators see the same structure and sequence every time they configure SPO.

The console includes two main modules:

- **Platform** — Covers platform-wide setup including branding, localization, identity management integrations, and email configuration. Also includes operational data, groups and roles assignment, assets, knowledge management, AI skills, CMDB, AI Search, and security settings.
- **Procurement Case Management** — Covers Employee Experience, Case Types, Assignment & Routing, Playbooks, Notifications, Platform, Workspace, Properties, and Otto Skills.

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SPO Configuration Console, Configuration Summary page



Step indicators

Each configuration item in the console navigation panel carries indicators that orient administrators before they open it:

- A **Suggested** label and icon for recommended steps, or an optional indicator for steps not required for go-live.
- A lock icon and prerequisite list when a dependency step has not yet been marked **Configured**.
- **New** or **Updated** labels for steps that are new or modified in the current product version.

Each module requires the *sn_spend_psd.admin* role to view or configure its steps.

Setup status

The **Configuration Summary** page, the default landing page for the console, shows a **Setup status** section with the overall percentage of configuration items completed across the instance. Below the overall percentage, a separate progress gauge for each module shows how many of that module's configuration items are marked **Configured** out of the module's total. Selecting **Get Started** on a module with no completed items, or **Continue** on a module already in progress, opens that module's first available configuration item.

Configuration activity

A **Configuration activity** section on the **Configuration Summary** page shows how configuration changes are captured. Configuration changes are recorded automatically into batched update sets, without requiring administrators to manage update sets manually.

This section provides two tabs:

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- **Configured items** — A searchable, sortable list of individual configuration changes not yet included in a completed batch. The list shows the configuration item, the module section it belongs to, who configured it, and when it was last updated. A **Go to active batch** link opens the update set currently collecting these changes.
- **Completed batches** — The update sets already packaged from prior configuration activity.

For the procedure to package and download these update sets, see Configure Sourcing and Procurement Operations.

Tracking progress on a configuration item

Administrators select **Mark as Configured** on a step to record it as complete. The status is reflected in the console navigation and in the step header, and rolls up into that module's progress gauge in **Setup status**. Administrators can return to a previously configured step and re-configure it without losing the earlier configuration.

Learning resources

Documentation links, video guides, and community articles relevant to a configuration item are accessible inline within that step, without navigating away from the console. Each step also indicates whether ServiceNow Otto agent assistance is available for that item or whether it is a manual-only configuration step. A **How this works** link on the **Configuration Summary** page explains the console at a high level.

For the procedure to open the console and an overview of what you can do from it, see Configure Sourcing and Procurement Operations. For the configuration areas available under Procurement Case Management, see Configuring case management in Sourcing and Procurement Operations.

Configure Sourcing and Procurement Operations

Open the SPO Configuration Console and complete the configurations for your SPO deployment.

Before you begin

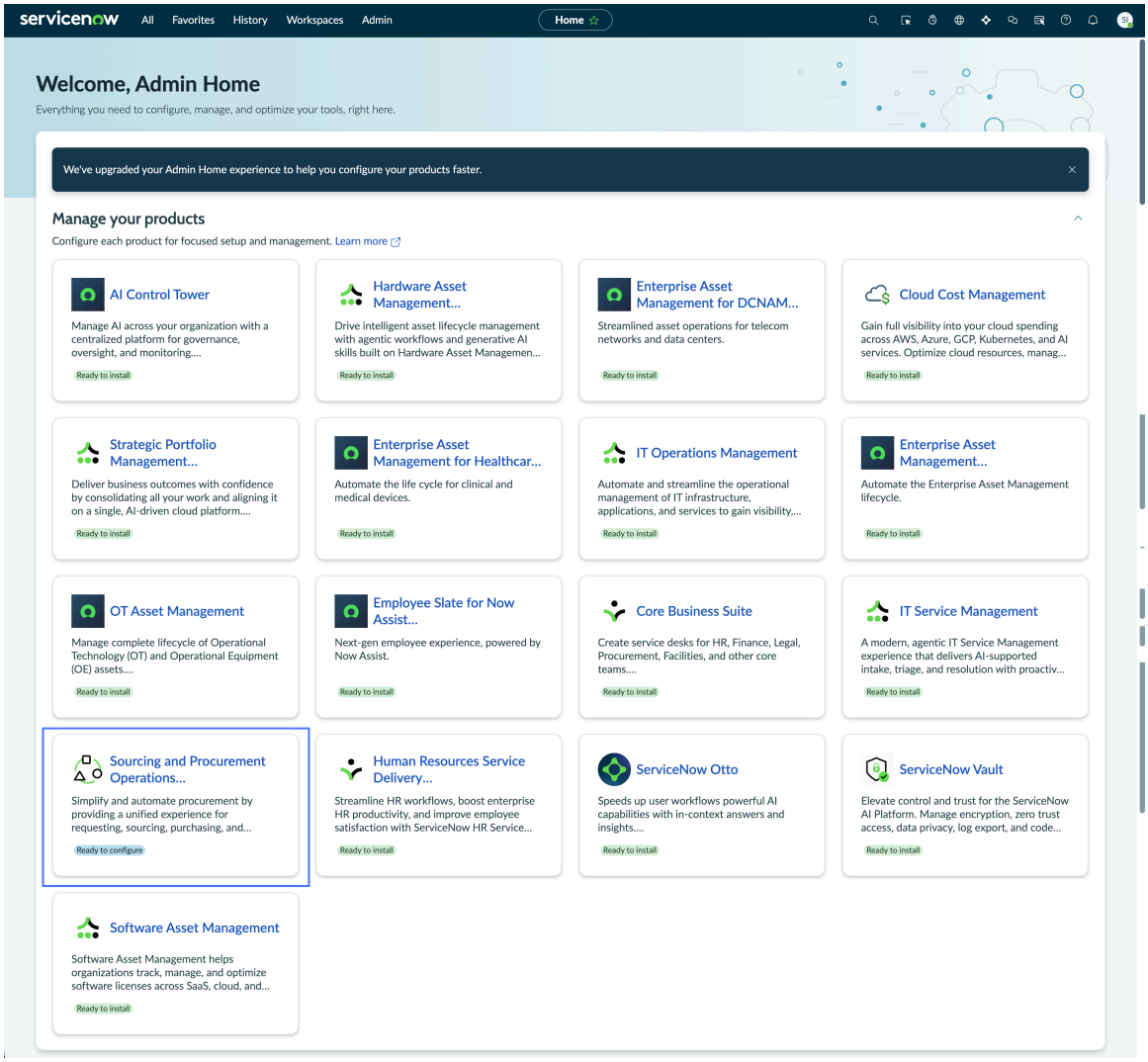
Sourcing and Procurement Operations must be installed on your instance. See Install Sourcing and Procurement Operations.

Role required: admin

Procedure

1. From the header of your ServiceNow instance, navigate to **Admin** > **Admin Home**.
2. From the **Manage your products** section, select Sourcing and Procurement Operations.

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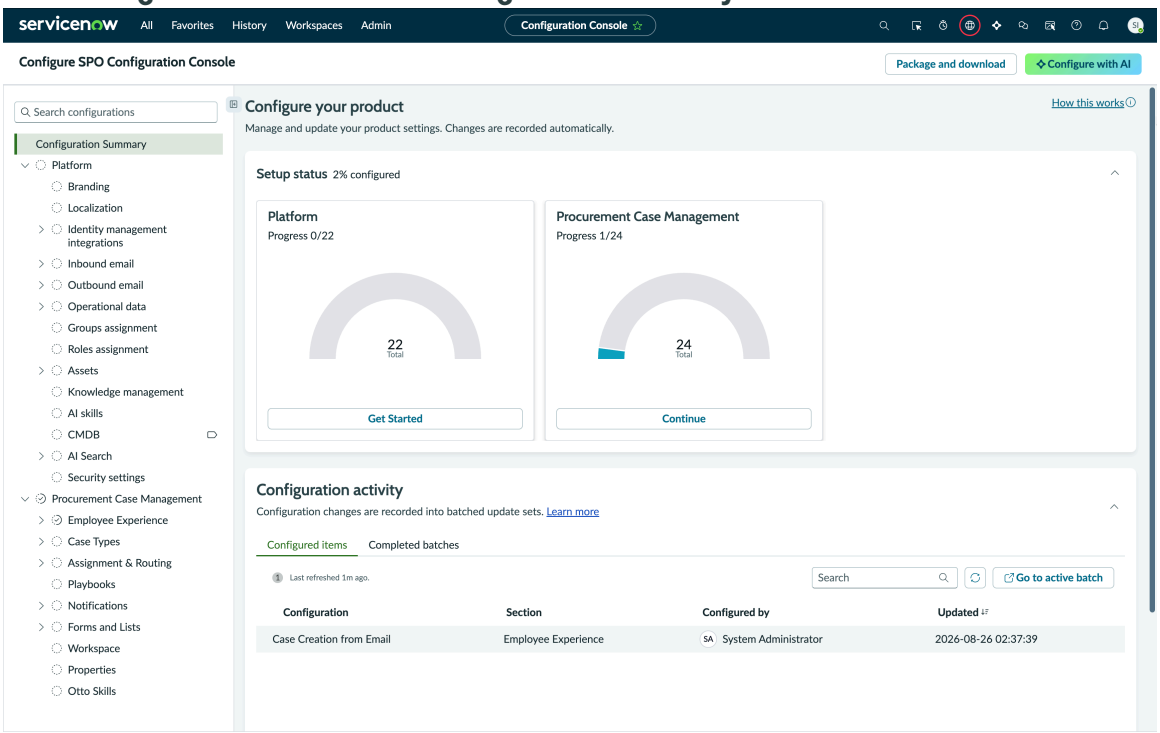


The Product Hub page for Sourcing and Procurement Operations is displayed.

3. From the **Configure your product** section, select **Configure**.
   The SPO Configuration Console is displayed.
4. From the SPO Configuration Console, perform any of the following tasks.

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SPO Configuration Console with Configuration Summary selected



Choice	Description
Configuration Summary in the left navigation pane	Provides a summary of configuration activity and progress across modules.
Configure with AI	Opens ServiceNow Otto to configure the selected item. Availability depends on whether that configuration item supports agent assistance.
Configurations under Platform and Procurement Case Management in the left navigation pane	For each module, view the default configuration (if available) and modify it if necessary. For the configuration areas available under Procurement Case Management, see Configuring case management in Sourcing and Procurement Operations.
Package and download	Packages configuration changes into an update set and downloads it, for promotion to another instance.

Configuring case management in Sourcing and Procurement Operations

Configure case types, routing rules, specialist workspace, notifications, and AI skills in the Procurement Case Management module of the SPO Configuration Console.

The **Procurement Case Management** module of the SPO Configuration Console groups configuration items into the following areas, in the same order they appear in the console navigation: **Employee Experience**, **Case Types**, **Assignment & Routing**, **Playbooks**, **Notifications**, **Forms and Lists**, **Workspace**, **Properties**, and **Otto Skills**.

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Employee Experience

Employee Experience configurations

Configuration	Description
Intake Forms	Configure the request forms employees use to submit procurement cases through the employee center. Edit an existing form or create one. Each form becomes a tile requesters see when browsing the procurement catalog.
Case Creation from Email	Configure the inbound email action to automatically create a procurement case when email is sent to a designated procurement mailbox.
Standard Ticket Configuration	Configure the information, fields, and request-specific details displayed on employee tickets. Define the actions, tabs, and supporting content available to employees. Create a consistent ticket experience that helps users track and manage their requests.
Stepper Statuses	Configure the plain-language progress labels requesters see as their procurement case moves through its lifecycle.
Employee Center Notification	Review and validate the employee center notifications used for procurement cases. Verify they are correctly scoped, render accurately, and fire only at the intended case states.
Case Resolution Acceptance	Configure the resolution acceptance workflow, including the auto-close period. Requesters can confirm the outcome of a case before it closes.

Case Types

A case type must exist before you can configure an SLA definition that references it.

Case Types configurations

Configuration	Description
Create a Case Type, Configure Templates and Intake Forms	Register the choice value on the Case Type field. Create a matching template with default routing and state. Publish a record producer for the case type so employees can raise it from the employee center.
SLA Definitions	Create resolution and response SLA definitions for the case type, including breach escalation conditions. Time-based commitments are enforced and visible to specialists and requesters.

Assignment & Routing

These configuration items control how procurement cases and work items are routed to specialists.

Assignment & Routing configurations

Configuration	Description
Template Based Assignment	Configure assignment templates to route incoming procurement cases automatically to the correct team or specialist based on case type and requester attributes.

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Assignment & Routing configurations (continued)

Configuration	Description
Assignment Rules	Configure platform-level assignment rules to route procurement cases to the correct group based on case attributes and requester details, such as department.

The **Advanced Work Assignment** node groups the following configurations:

Advanced Work Assignment configurations

Configuration	Description
AWA Service Channels	Configure the Advanced Work Assignment (AWA) service channel to capture, queue, and surface procurement work items to specialists correctly.
AWA Assignment Rules	Configure AWA assignment rules to distribute queued procurement work items to specialists based on skills, load, and case attributes.
AWA Assignment Eligibility	Configure assignment eligibility to ensure only the right specialists or groups receive work from each AWA assignment rule.
AWA Presence States	Configure presence states to indicate when specialists are available to receive work.
AWA Rejection Reasons	Configure the rejection reasons specialists select, with optional mandatory-comment rules, when returning a pushed procurement work item.
AWA Queues	Configure named queues and their priority order to buffer and route procurement work items to specialists in a controlled way.

Playbooks

Configure playbooks that guide fulfillers through the steps to resolve each procurement case type. Each playbook maps to a case type and defines the activities fulfillers must complete. Selecting a playbook opens it in the Playbook Designer in a new tab.

Notifications

Notifications configurations

Configuration	Description
Procurement Case Email Notifications	Configure outbound email notifications for key procurement case lifecycle events, including SLA breach warnings and escalations. ServiceNow Otto agent assistance is available through **Configure with AI**.
In-App Notifications for Cases	Configure in-app notifications to send real-time alerts to procurement specialists and requesters within the ServiceNow interface.

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Forms and Lists

Forms and Lists configurations

Configuration	Description
Case Forms	Configure the procurement case form, including fields, UI policies, and read-only protections. Specialists use the well-structured form to manage cases.
Case List Views	Configure procurement case list views and publish them to the right roles. Specialists and managers see the columns relevant to their work.

Workspace

The Source-to-Pay Workspace is set up with default views and lists for procurement agents. Customize the workspace layout, navigation, and list configurations in UI Builder to match your team's workflow.

Properties

Review and update system properties that control Procurement Case Management behavior from a single filtered list.

Otto Skills

Configure AI skills to enhance procurement case management with automated summarization, email response drafting, and sentiment analysis.

Note: ServiceNow Otto uses AI to generate content. AI-generated content may be inaccurate. Review all AI-generated output before using it.

ServiceNow Otto for SPO configurations

Configuration	Description
Otto Skills — case summarization	Configure the case summarization skill to enable procurement specialists to generate instant, structured case summaries.
Otto Skills — email response	Configure the email response skill to enable procurement specialists to draft accurate, contextually relevant replies directly from the case.
Otto Skills — sentiment analysis	Configure the sentiment analysis skill to enable specialists and managers to monitor requester sentiment and intervene proactively. The skill automatically updates the Requester Sentiment field and triggers escalation alerts.

ServiceNow Otto agent assistance, available through **Configure with AI**, also extends to some of the configuration items described earlier in this topic. An agent can create and edit records for Email Notifications, Create SLA Definitions, Case Forms, and Case List Views.

Setting up primary data for ShoppingHub

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

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Related topics

- Install Sourcing and Procurement Operations
- Service portal configuration for ShoppingHub
- 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.
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.

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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.
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.

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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.

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.

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Field	Description
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.

About this task

https://player.vimeo.com/video/1143155462?h=59e51ab483&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_shop.shopping_hub_admin

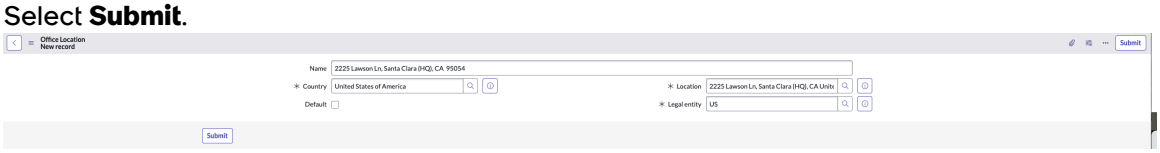
Procedure

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: sn_fin.procurement_primary_data_admin and sn_shop.procurement_administrator

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.

About this task

https://player.vimeo.com/video/1143155425?h=a0ea47fcb2&badge=0&autopause=0&player_id=0&app_id=58479

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.

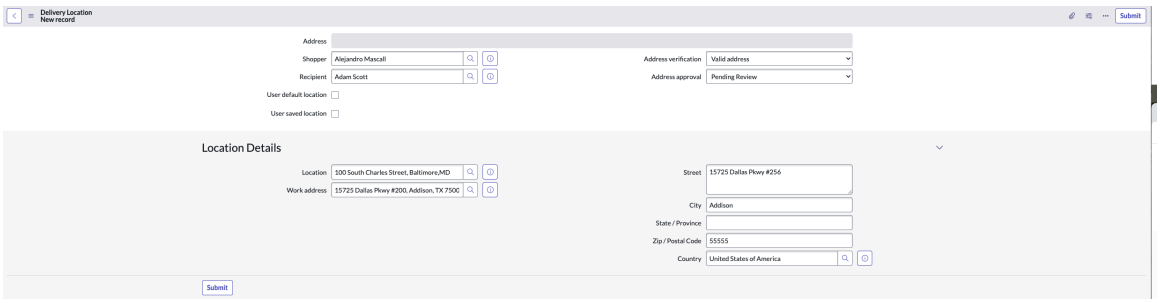
Delivery Location form

Field	Description
Address	Displays the value of the combination of recipients name and location details.

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

5. Select **Submit**.



Setting up your product catalog

You can set up your product catalog by grouping the supplier products that you want to appear on the 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.

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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.
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.

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Field	Description
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.
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.

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Field	Description
Allow as primary	Option to determine if assets of this product category can be primary components of a bundle.
Allow in bundle	Option to determine if assets of this product category can be components of a bundle.

4. Select **Submit**.

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

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

Related lists of a product category

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

Create product models to group supplier products

Create product models to group your supplier products.

Before you begin
Role required: sn_shop.shopping_hub_admin

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

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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.

Create model fields

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.
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.

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Field	Description
Assets	Assets that are created from this model. You can have any combination of assets and configuration items. For example, with a single hardware model, you can have assets and no configuration items, configuration items and no assets, or both configuration items and assets.
Configuration Items	Configuration items that are created from this model. You can have any combination of assets and configuration items.
Purchasing Automation	
Product category	Category to which this product belongs.
Spend categorization	Products of this category that can be sourced or not. The default value is based on the selected product category.
Product type	Type Good or Service. The default value is based on the selected product category.
Good receipt required	Goods receipt that is required or not. This field appears only if the product type selected is **Good**. The default value is based on the selected product category.
Acknowledgment type	Receipt of confirmation and the type of receipt. The options available are **Milestones**, **Service Acknowledgment**, and **Two Way Match**. The default value is based on the selected product category but the value provided here can override it. This field appears only if the product type selected is **Service.**
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**.

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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.
- Create ledger assignment rules for this product model. See add a ledger assignment rule.

Add a supplier product

Add supplier products to populate the primary data.

Before you begin

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

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

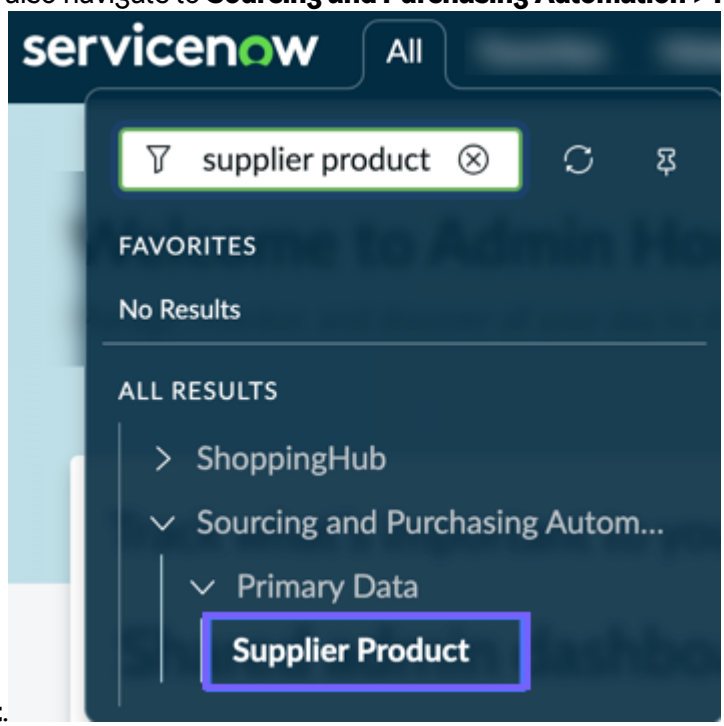
About this task

https://player.vimeo.com/video/1143155478?h=a380c18a04&badge=0&autopause=0&player_id=0&app_id=58479

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.

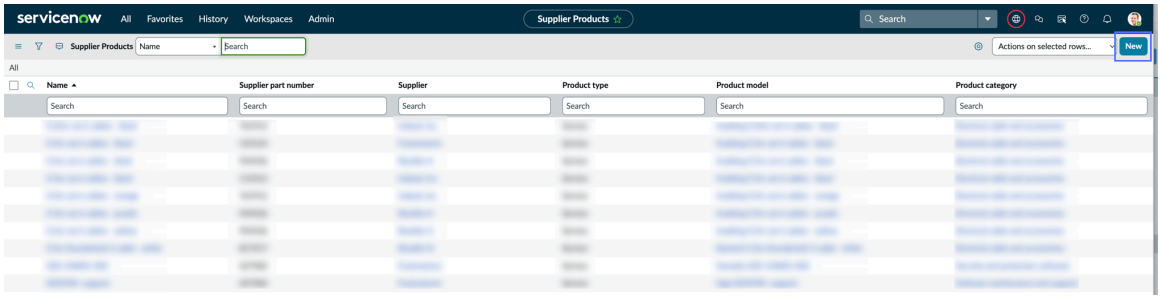
Procedure

1. Navigate to **All** > **ShoppingHub** > **Supplier Products** > **Published Products**.
   You can also navigate to **Sourcing and Purchasing Automation** > **Primary Data** > **Supplier Product**.

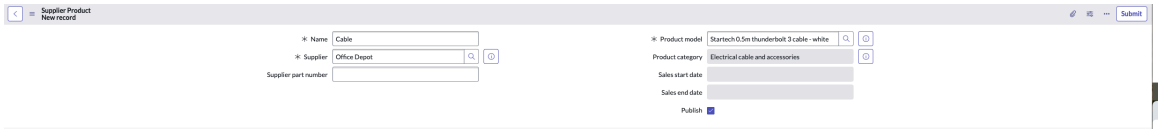


2. Select **New**.

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3. On the form, fill in the fields.



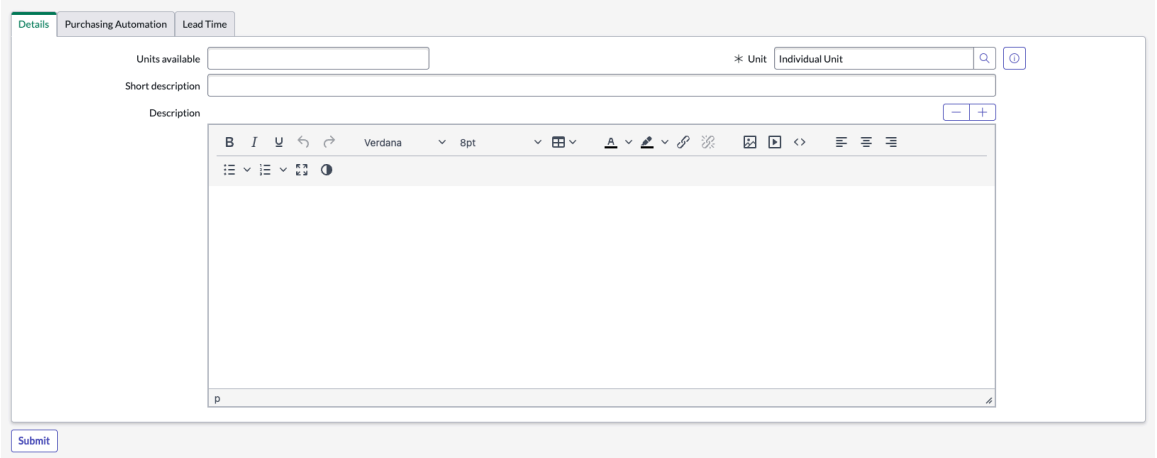
Supplier product form

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.

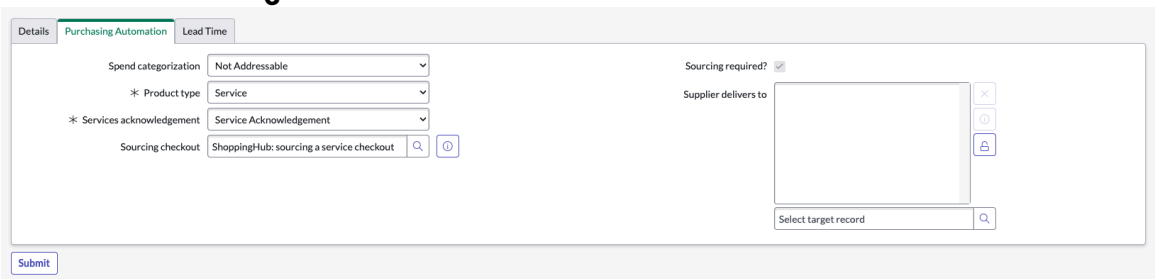
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Details form

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.



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

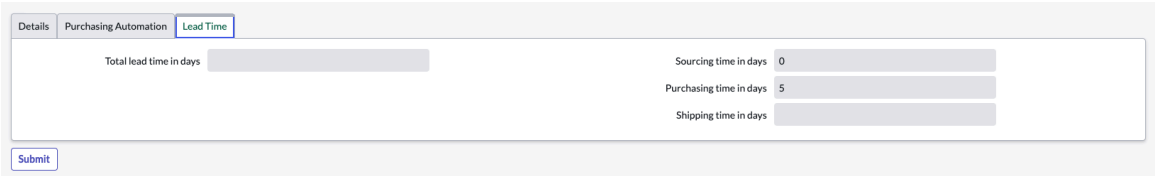
Field	Description
Spend categorization	Product that is addressable for negotiation. You can select one of these options: ○ **Addressable**: Can be considered for negotiation. ○ **Not Addressable**: Cannot be considered for negotiation.
Product type	Type of product. The options are **Good** or **Service**.
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:

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Field	Description
	○ **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.
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.

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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.
   - 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

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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:

Supplier onboarding time calculation

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

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:

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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 time calculation		
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		
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

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Sourcing time calculation (continued)

- 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:

Purchasing time calculation

Purchase Requisition A for Reseller A	Purchase Requisition B for Reseller B	Purchase Requisition C for Reseller B	Purchase Requisition D for Reseller A
• Actual duration = 16 days • Purchase line 1	• Actual duration = 13 days • Purchase line 3	• Actual duration 21 days • Purchase line 4	• Actual duration = 7 days • Purchase line 5

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Purchasing time calculation (continued)			
○ 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	○ Supplier Product = Reseller B MacBook ○ Product Model = MacBook ○ Product Category = Hardware	○ Supplier Product = Reseller B Office 365 ○ Product Model = Office 365 ○ Product Category = Software	○ 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.

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

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Total lead time

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

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

- If sourcing and supplier onboarding are required,

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

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

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

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

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

- If sourcing and supplier onboarding are not required,

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

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

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

Ledger assignment rules

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

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

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

1. Supplier product with cost center
2. Product model with cost center
3. Product category with cost center
4. Spend category with cost center
5. Supplier product
6. Product model
7. Product category
8. Spend category

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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 supplier product, product model, product category, spend category, 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
Product category	Product category that the ledger assignment rules apply to.
Spend category	Spend category that the ledger assignment rules apply to.
Product model	Product model that the ledger assignment rules apply to.
Supplier product	Supplier category that the ledger assignment rules apply to.
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.
Applies to child product categories	Controls if general ledger accounts are used for one or more child product categories.
Child product categories	Add child product categories. This field is visible only if the **Applies to child product categories** check box is selected.
Applies to child spend categories	Controls if general ledger accounts are used for one or more child spend categories.
Child spend categories	Add child spend categories. This field is visible only if the **Applies to child spend categories** 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. Configure an approval rule for a delegate to ensure that the business owner has better visibility into the request before approval. For more information, see Configure approval rule for a delegate.

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Field	Description
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.

Configure approval rule for a delegate

Configure an approval rule for a delegate to ensure that the business owner has better visibility into the request before approval.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

https://player.vimeo.com/video/1143155520?h=454a7a3524&badge=0&autopause=0&player_id=0&app_id=58479

In Shopping Hub, when a delegate checks out on behalf of the delegator, the default workflow assumes the delegate has full permissions to submit purchase requests (PRs). However, you can configure an approval rule to ensure that the first approval request is sent to the business owner (delegator). This configuration enables the delegator to review the approval request and decide whether to approve or reject it.

Procedure

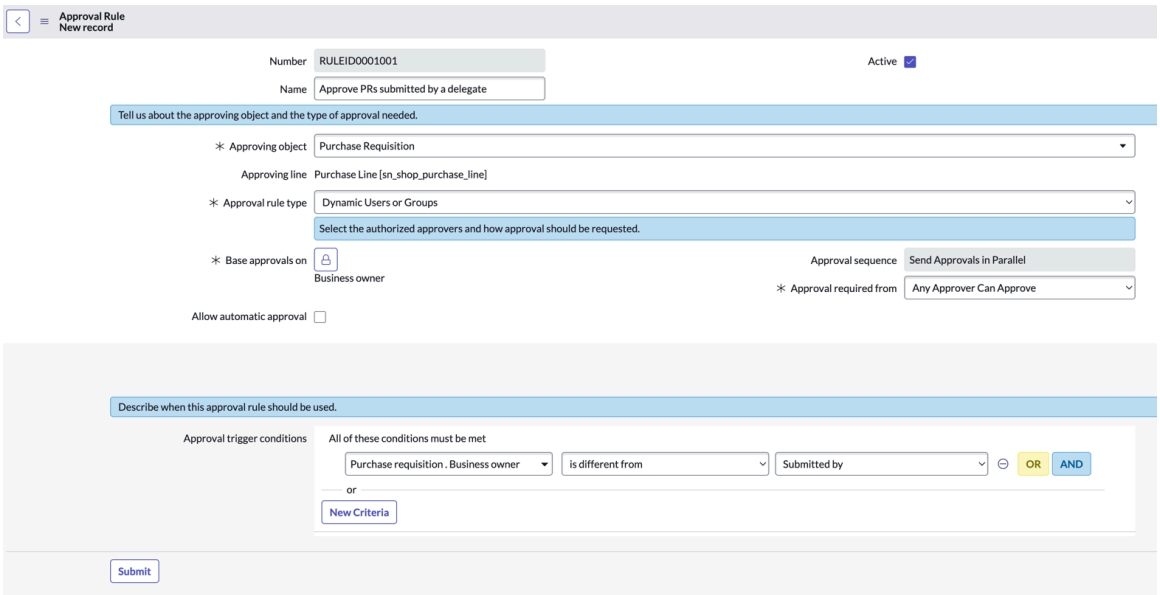
1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Administration** > **Approval Rules**.
2. In the form, fill in the fields.

Approval Rule form

Field	Description
Number	System-generated unique identifier for the approval rule.
Name	The name you assign to the approval rule.
Active	Option to enable the approval rule.
Approving object	Object you're seeking approval for. Select **Purchase Requisition**.
Approving line	Approving object line that you're seeking approval for. For the Purchase Requisition object, the approving line is defaulted to Purchase Line.
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: ○ Dynamic Users or Groups ○ Managerial Job Code Hierarchy ○ Managerial Hierarchy ○ Specified Users or Groups

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Field	Description
Base approvals on	Purchase requisition fields that you want to base your approvals on. Select the **Business owner** field and move it from Available to Selected.
Allow automatic approval	Option to allow automatic approval. **Note:** Ensure that you deselect this option.
Approval trigger conditions	Conditions based on the approving object that determine the conditions under which an approval plan is created. See the following image to understand the approval trigger conditions you need to configure.



3. Select **Submit**.

ShoppingHub configurations

ShoppingHub configurations control the shopper experience for procurement workflows, including request modifications and sourcing checkouts.

The ShoppingHub configuration creates records that standardize the shopper experience across procurement workflows such as request modifications and sourcing checkouts. These records provide more control and flexibility over business processes.

When you enable Edit or Cancel configuration options, your shoppers can raise revision requests without contacting a support team from Service Catalog or ShoppingHub.

ShoppingHub configuration properties

You can enable or disable specific ShoppingHub features using system properties. These toggle-based settings provide detailed control over the shopper experience without requiring code changes.

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ShoppingHub system properties

Property name	Type	Default	Description
`sn_spend_uib.local_currency.enable.menuoption`	Boolean	true	Enables or disables the **View prices in** currency selector in the ShoppingHub navigation menu. When set to `false`, the selector is hidden and prices revert to the default catalog currency.
`sn_spend_uib.purchased_behalf.enable.card_actions`	Boolean	true	Enables or disables purchase action cards (reorder, cancel) on the My Purchases page for users who shop on behalf of another user. When set to `false`, action buttons are suppressed for buy-on-behalf sessions.
`sn_shop.watchlist.user.limit`	Integer	20	Maximum number of users that can be added to the watchlist during Quick Checkout and Full Checkout. If the limit is exceeded, shoppers see

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ShoppingHub system properties (continued)

Property name	Type	Default	Description
			an error and the save is blocked.

To configure these properties, navigate to **System Properties** and search for the property name or filter by application scope (`sn_spend_uib` or `sn_shop`).

Note: Other ShoppingHub behavior such as catalog rules, approval policies, checkout record producers, and UI images is configured through the ShoppingHub Configuration table (`sn_shop_shopnow_content`), not through system properties.

Related topics

- Enable a shopper to purchase on behalf of another user
- Purchase modification configuration
- Configure sourcing checkout details
- Enable user actions

Enable a shopper to purchase on behalf of another user

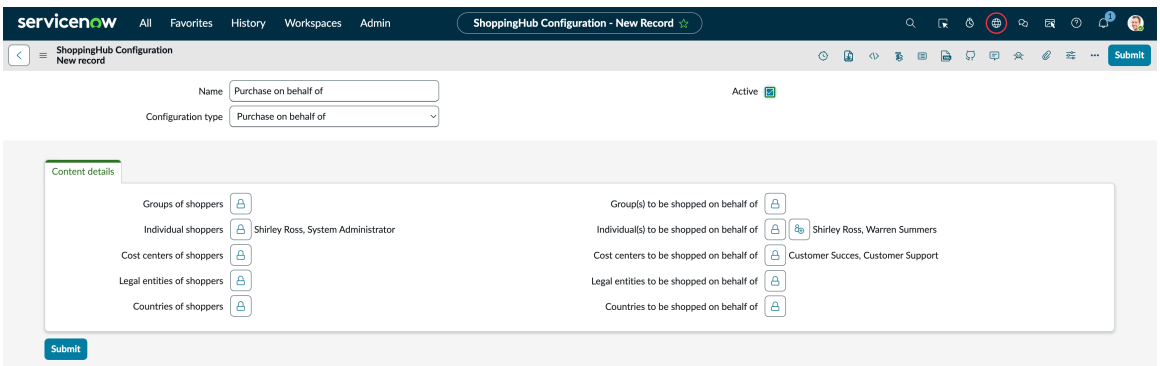
Configure the Shopping Hub to enable a shopper to purchase on behalf of another user.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **ShoppingHub** > **Administration** > **ShoppingHub Configuration**.
2. Select **New**.



3. On the form, fill in the fields.

ShoppingHub Configuration

Field	Description
Name	Name of the configuration
Configuration type	Select **Purchase on behalf of** from the list to enable purchasing on behalf of another user.
Active	Check box that indicates whether the configuration is active.

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Field	Description
Group of shoppers	The group of shoppers who are authorized to purchase on behalf of other users.
Group(s) to be shopped on behalf of	The group of users for whom purchases can be made on their behalf.
Individual shoppers	Individual users who are authorized to purchase on behalf of other users.
Individual(s) to be shopped on behalf of	The individual users for whom purchases can be made on their behalf.
Cost centers of shoppers	The cost centers of shoppers who are authorized to purchase on behalf of users in the same cost centers.
Cost centers to be shopped on behalf of	The cost centers of the users for whom purchases can be made on their behalf.
Legal entities of shoppers	The legal entities of shoppers who are authorized to purchase on behalf of users in the same legal entities.
Legal entities to be shopped on behalf of	The legal entities of the users for whom purchases can be made on their behalf.
Countries of shoppers	The countries of shoppers who are authorized to purchase on behalf of users in the same countries.
Countries to be shopped on behalf of	The countries of the users for whom purchases can be made on their behalf.

Note: The cost center, legal entity, and country fields can be used on their own or together with the group and individual fields. A match on any configured field is sufficient to authorize the purchase-on-behalf-of relationship.

4. Select **Submit**.

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

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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.psd_admin, sn_shop.procurement_administrator

Procedure

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

ShoppingHub Configuration

Field	Description
Name	Name of the configuration
Configuration type	Select the type from the available list. For example, user interface.
Display label	Display label of the ShoppingHub configuration
Active	Check box to determine the active status of this configuration
Page	Page information for ShoppingHub configuration
Section	Section information for ShoppingHub configuration
Record producer used for checkout	Select the record producer. The following record producers are used for sourcing checkout: ○ **ShoppingHub: sourcing a good checkout** ○ **ShoppingHub: sourcing a service checkout**

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

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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.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
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

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

You may add additional configurations to suit your business requirements.

Sourcing checkout

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

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

You can use the following capabilities:

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

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

Related topics

Configure sourcing checkout

Complete sourcing checkout

Create sourcing checkout record

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

Before you begin

Role required: sn_shop.procurement_administrator

About this task

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

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

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3. On the form, fill in the fields.
4. Select the **Destination** tab and fill in the fields.
5. Select the **Location** tab and select a catalog and category where requesters can find the item. Fill in the fields or use the available information.
6. Select the **Questions** tab and create custom or select from the preconfigured questions. The following questions are available in the default sourcing checkouts.

Question set	Description
ShoppingHub: Product & Other data for Checkout	Collects data about the product that is sourced from the Shopping Hub product de tails page. Includes multiple variables that map to the cart line and purchase line. This is included in every Shopping Hub checkout which cannot be removed when using the cat alog builder template.
ShoppingHub Checkout Delivery Date for Goods Selector	Select a delivery date or create a blanket PR for a good. Includes multiple variables that map to the cart line and purchase line.
ShoppingHub Checkout Delivery Date for Services Selector	Select a start date and end date or create a blanket PR for a service. Includes multiple variables that map to the cart line and pur chase line.
ShoppingHub Delivery Location Selector	Select an office location or add a new loca tion for a product or service to be delivered to. Includes multiple variables that map to the cart line and purchase line.
ShoppingHub More Info Request	Provide additional info while sourcing a prod uct. Maps to the sourcing request details field in the cart line and sourcing.
ShoppingHub Other Request	Provide details about “something else” when sourcing a product. Maps to the sourcing re quest details field in the cart line and sourc ing request.
ShoppingHub Purchase Reason	Provide a reason for purchase. Maps to the purchase reason field in the cart line and sourcing request.
ShoppingHub Sourcing Intent	Select whether they want to receive a quote, a POC, more info, or something else about a good or service being sourced. Maps to the re quest type field in the cart line and sourcing request.
ShoppingHub: Good Delivery Date (only)	Select a delivery date for a good. Maps to the estimated delivery date field in the purchase line.
ShoppingHub: Service End Date (only)	Select an end date to a service. Maps to the end date field in the purchase line.
ShoppingHub: Service State Date (only)	Select a start date to a service. Maps to the start date field in the purchase line.

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7. Select the **Settings** tab and fill in the fields.
8. Select **Review and Submit**.

Related topics

Configure sourcing checkout

Record Producer

Create a record producer

Edit sourcing checkout record

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

Before you begin

Role required: sn_shop.procurement_administrator

About this task

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

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

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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.
- **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.

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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. 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**.

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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.

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.

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Field	Description
Active	Option to mark the work item relation as available for use.

4. Select **Submit**.

Configure punchout for third-party site purchases

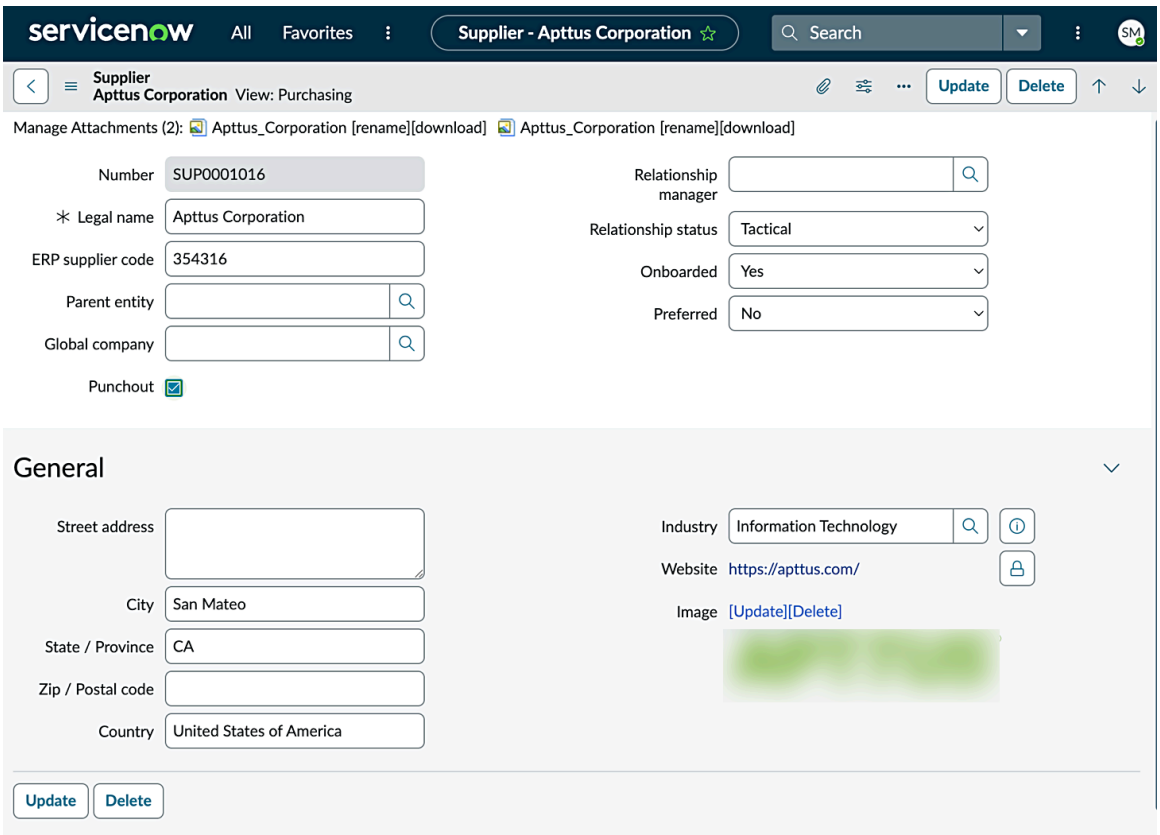
Set up punchout configuration to allow shoppers or employees to make third-party site purchases.

Before you begin

Role required: sn_shop.procurement_administrator

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.

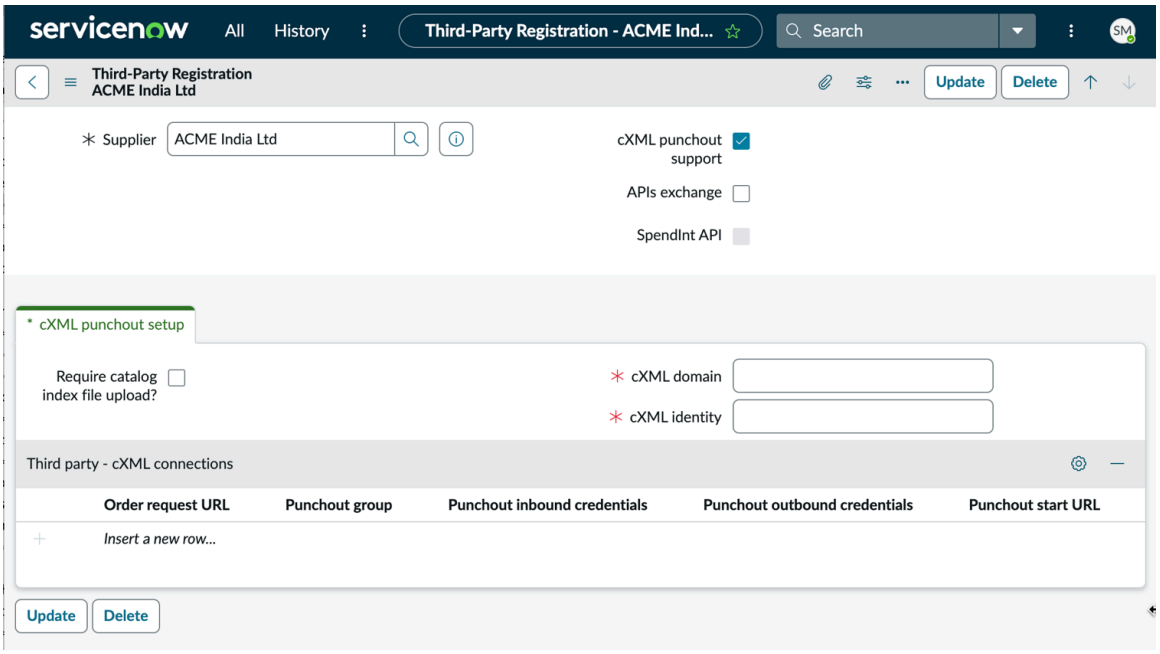
3. Navigate to **All** > **Procurement Integrations** > **Catalog** > **Third-Party Categories**.
4. Do the following:

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- 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. For more information, see Add third-party catalog data in an Excel file.

Catalog data and third-party cXML - connections

Field	Description
Require catalog index file upload?	Option that enables you to upload the catalog index CSV file. For more information, see Add third-party catalog data in an Excel 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	

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Field	Description
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 SPO uses to validate incoming cXML payloads from the supplier for Order Confirmation and Shipping Confirmation. Select a credential record of type **Basic Auth**. **Important:** Although the credential type is labelled **Basic Auth** in the UI, the fields carry cXML-specific values used to validate incoming supplier payloads: ▪ **Username**: Enter the value that the supplier places in `<Header><To><Credential><Identity>` of its confirmation cXML payload. This must match exactly — SPO validates this value against the incoming `<To>` Identity. ▪ **Password**: Enter the Shared Secret that the supplier places in `<Header><Sender><Credential><SharedSecret>` of its confirmation cXML payload. SPO decrypts and validates this value against the incoming payload. Inbound credentials are required for Order Confirmation and Shipping Confirmation flows. If the inbound credential record is missing or invalid, SPO returns a validation error when the supplier sends a confirmation payload. Configure these credentials before going live with a cXML punchout supplier that sends order or shipping confirmations.
Punchout outbound credentials	The credentials that SPO uses to authenticate when sending cXML requests to the supplier system. Select a credential record of type **Basic Auth**. **Important:** Although the credential type is labelled **Basic Auth** in the UI, it does not function as standard HTTP Basic Authentication for punchout. The two fields in the credential record carry cXML-specific values: ▪ **Username**: Enter the Sender Identity that identifies your organization in the punchout transaction. This value is written verbatim into both `<From><Credential><Identity>` and `<Sender><Credential><Identity>` in the cXML payload. If left blank, an empty `<Identity/>` element is transmitted. ▪ **Password**: Enter the Shared Secret provided by the supplier for authentication. This value maps to `<Sender><Credential><SharedSecret>` in the cXML payload. The **cXML identity** and **cXML domain** fields on this form identify the supplier's `<To>` side of the cXML transaction and are separate from the outbound credential fields described above.
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.

Punch out suppliers

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 API	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**.

What to do next

When integrating with a punchout supplier, customers are required to provide specific URLs for Order Confirmation and Shipping Confirmation. For more information, see Providing Order and Shipping Confirmation URLs to Punchout Suppliers.

Related topics

- Install Sourcing and Procurement Operations
- Setting up primary data for ShoppingHub
- Service portal configuration for ShoppingHub
- Customize your top suppliers on Shopping Hub
- Using Shopping Hub
- My purchases on Shopping Hub

Providing Order and Shipping Confirmation URLs to Punchout Suppliers

When integrating with a punchout supplier, customers are required to provide specific URLs for Order Confirmation and Shipping Confirmation.

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These URLs must be configured correctly to confirm seamless communication between the customer's instance and the punchout supplier's system.

URLs to punch out supplier's system

URL name	URL format
Order Confirmation URL	`instance-name`/api/sn_spend_intg/punchout/orderconfirmation/`sys_id`
Shipping Confirmation URL	`instance-name`/api/sn_spend_intg/punchout/shippingconfirmation/`sys_id`

Where:

- `instance-name` is the customer's instance name.
- `sys_id` is the unique system ID of the punchout supplier record stored in the Supplier (sn_fin_supplier) table.

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.

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**.

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3. On the Script Include form, fill in the fields.

Script Include form

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.
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**.

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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 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: sn_shop.procurement_administrator

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.

Third-party units fields

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.

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Field	Description
	The available standard units are: ○ Individual Unit ○ Fixed Fee Any custom unit created will behave like an Individual Unit in the purchasing workflow. For example, if a unit called Box is created and a user purchases 10 Boxes, the system will treat it as a quantity of 10, even if each Box contains 5 Individual Units. **Note:** Define a unit of measure conversion if you want to convert the purchased quantity into a different number of assets. For example, if a user purchases 10 Boxes, and each Box contains 5 Individual Units, the system will generate 50 assets.
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 Catalog**.
6. Ensure that all unit of measure mappings are accurate, and make any necessary updates.

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.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **Procurement integrations** > **Catalog** > **Third-Party Categories**.
2. Select **New**.
3. On the form, fill in the fields.

Third-party category 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.

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Field	Description
	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 Catalog**.
6. Ensure that all product category mappings are accurate, and make any necessary updates.

Add third-party catalog data in an Excel file

You can download and add third-party catalog data in an Excel file template.

Before you begin
Role required: sn_shop.procurement_administrator

Procedure
1. Select **All**.
2. In the navigation filter, enter **sn_spend_intg_third_party_catalog_list.do.**.
3. Right-click any column heading and select **Export** > **.xlsx**.
4. Select **Download** to save the spreadsheet on your local system.

Result
An Excel template is created with the required columns for adding the third-party catalog data. Use this Excel spreadsheet to enter the data that you want to upload and store into the Third-party Catalog (sn_spend_intg_third_party_catalog) table.

What to do next
After adding the required data to the Excel file, upload it to store the data in the Third-party Catalog (sn_spend_intg_third_party_catalog) table. For more information, see Configure punchout for third-party site purchases.

Configuring work prioritization

Configure decision table rules to automatically assign priority to purchase requisitions, sourcing requests, and procurement cases based on your organization's criteria.

Configure work prioritization for procurement cases

Configure the **Priority defaulting for procurement cases** decision table to automatically assign priority levels to procurement cases based on conditions you define.

Before you begin
Before configuring work prioritization for procurement cases, confirm the following:

- The Procurement Case Management application (`sn_spend_psd`) is installed and active on the instance.
- The Shopping Hub application (`sn_shop`) is installed and active — it provides shared priority utilities used by all three record types.

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- The following priority levels exist and are active in the instance's priority choice list: Critical, High, Moderate, Low, and Planning.
- Your organization has agreed on the business criteria for prioritizing procurement cases before you open the decision table. The table ships with no rules — all conditions must be defined from scratch.

Role required: sn_spend_psd.psd_admin

About this task

The **Priority defaulting for procurement cases** decision table contains the rules that determine how priority is assigned to procurement cases. Unlike the purchase requisition and sourcing request tables, this table ships with no pre-built rules. Administrators define all conditions from scratch based on the criteria most relevant to their organization.

Any field on the procurement case or case line record can be used as a condition input. For example, case type, modification type, spend category, supplier tier, or contract value. There are no prescribed evaluation dimensions.

This table belongs to the Procurement Case Management application, which is a separate package from the ShoppingHub application that contains the purchase requisition and sourcing request decision tables. If the table does not appear in the decision tables list, confirm that the Procurement Case Management application is installed and that your role includes access to that application scope.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Decision Tables**.
2. In the decision tables list, select **Priority defaulting for procurement cases**.

   The decision table opens showing the table header, two input columns (**Procurement case** and **Procurement case line**), and an empty rules grid.
3. Add a rule row to the rules grid.
4. Configure the rule row by selecting each cell and providing the required values.
   - To set a condition, select the operator cell and choose an operator, then select the condition value cell and enter a value.
   - To set the result, select the result value cell and choose the priority level to assign when the rule matches.

   For detailed information about working with decision table cells, conditions, and results in Workflow Studio, see Modify decision table rules in Workflow Studio.
5. In the **Rank** column, set the evaluation sequence for each rule.

   To change a rank value, double-click the number to edit it, enter a new value, and press **Enter**. The system evaluates rules in ascending rank order — the rule with the lowest rank number is evaluated first. Place rules for higher-urgency conditions at a lower rank number.
6. Select **Save** to save the rule.

   Repeat steps 3 through 6 for each additional rule.

   Next, verify that the priority recalculation business rules are active for the procurement case and procurement case line tables.

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7. Navigate to **System Definition** > **Business Rules** and search for **Recalculate priority on update** filtered by the procurement case table and the procurement case line table. Confirm both rules show as active.
8. Test the configuration by creating or updating a procurement case with a case line that matches one of your configured rules.

   After the background rule runs, verify that the **Priority** field on the procurement case reflects the expected value. Also test a case that should not match any rule and confirm that its priority remains at **Planning**.

   Priority is assigned asynchronously after the record is saved, so allow a moment before checking the result.

Result

Procurement cases are automatically assigned a priority level when they are created or updated. Procurement specialists can sort and filter their work queue by priority to work the most urgent cases first.

Configure work prioritization for purchase requisitions

Configure the **Priority defaulting for purchase requisitions** decision table to automatically assign priority levels to purchase requisitions based on line item values or other administrator-defined conditions.

Before you begin

Before configuring work prioritization for purchase requisitions, confirm the following:

- The Shopping Hub application (`sn_shop`) is installed and active on the instance.
- The following priority levels exist and are active in the instance's priority choice list: Critical, High, Moderate, Low, and Planning.
- If demo data is loaded in the instance, review whether the default rules in the decision table reflect your organization's criteria before adding or modifying rules.

Role required: decision_table_admin

About this task

The **Priority defaulting for purchase requisitions** decision table contains the rules that determine how priority is assigned to purchase requisitions. Each rule evaluates one or more conditions on the purchase requisition or its line items and returns a priority level when those conditions are met.

The decision table includes example rules that evaluate the total line amount against four financial thresholds. These rules ship as demo data and may not be loaded in your production instance. Review the table before testing to confirm whether rules are present.

Any field on the purchase requisition or purchase line record can be used as a condition input, not just line amount. Administrators can replace or supplement the default rules with conditions based on spend category, supplier, requesting department, or other relevant fields.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Decision Tables**.
2. In the decision tables list, select **Priority defaulting for purchase requisitions**.

   The decision table opens showing the table header, two input columns (**Purchase requisition** and **Purchase line**), and the rules grid. Each row in the grid defines one rule.

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3. **Optional:** If demo rules are present, review each rule and decide whether to keep, modify, or delete it.

   (Optional) The default demo rules evaluate the **Total line amount** field on the purchase line against four financial thresholds. If these thresholds do not reflect your organization's prioritization criteria, delete or deactivate them before adding your own rules.

4. Add a rule row to the rules grid.
5. Configure the rule row by selecting each cell and providing the required values.
   - To set a condition, select the operator cell and choose an operator, then select the condition value cell and enter a value. For amount fields, enter a numeric value. For category or supplier fields, use the reference field lookup to select the correct records.
   - To set the result, select the result value cell and choose the priority level to assign when the rule matches.

   For detailed information about working with decision table cells, conditions, and results in Workflow Studio, see Modify decision table rules in Workflow Studio.
6. In the **Rank** column, set the evaluation sequence for each rule.

   To change a rank value, double-click the number to edit it, enter a new value, and press **Enter**. The system evaluates rules in ascending rank order — the rule with the lowest rank number is evaluated first. Place more specific or higher-urgency rules at a lower rank number.
7. Select **Save** to save the rule.

   Repeat steps 4 through 7 for each additional rule.

   Next, verify that the priority recalculation business rules are active for the purchase requisition and purchase line tables.
8. Navigate to **System Definition** > **Business Rules** and search for **Recalculate priority on update** filtered by the purchase requisition table and the purchase line table.

   Confirm both rules show as active. These rules are the triggers that call the decision table when records are created or updated.
9. Test the configuration by creating or updating a purchase requisition with a line item whose value matches one of your configured rules.

   After the background rule runs, verify that the **Priority** field on the purchase requisition reflects the expected value. Also test a requisition whose line values do not match any rule and confirm that its priority remains at **Planning**.

   Priority is assigned asynchronously after the record is saved, so allow a moment before checking the result.

Result

Purchase requisitions are automatically assigned a priority level when they are created or updated. Procurement specialists can sort and filter their work queue by priority to work the most urgent requisitions first.

Configure work prioritization for sourcing requests

Configure the **Priority defaulting for sourcing requests** decision table to automatically assign priority levels to sourcing requests based on the organizational seniority of the business owner or other administrator-defined conditions.

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Before you begin

Before configuring work prioritization for sourcing requests, confirm the following:

- The Shopping Hub application (`sn_shop`) is installed and active on the instance.
- The following priority levels exist and are active in the instance's priority choice list: Critical, High, Moderate, Low, and Planning.
- Job code records exist in the instance and are associated with user profiles in the expected way.
- The **Business owner** field is populated on sourcing request records. If it is empty, no job code can be evaluated and no rule will match.

Role required: decision_table_admin

About this task

The **Priority defaulting for sourcing requests** decision table contains the rules that determine how priority is assigned to sourcing requests. The default example rules evaluate the **Business owner** field on the sourcing request and assign priority based on the business owner's job code.

The example rules ship as demo data and are likely not loaded in your production instance. Even if they are present, they reference job code records by internal identifiers specific to the demo dataset. These identifiers will not match your organization's job code records and the rules will not produce results until they are reconfigured with the correct values from your instance.

The **Business owner is CFO or CEO** demo rule is an exception — it evaluates the text value of the job code field directly, making it more portable. However, it only produces results if your organization's job codes use exactly those text values.

If your organization does not use job code hierarchy as the basis for sourcing priority, the conditions can be replaced entirely. Any field on the sourcing request or purchase line record is available as a condition input.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Decision Tables**.
2. In the decision tables list, select **Priority defaulting for sourcing requests**.

   The decision table opens showing the table header, two input columns (**Sourcing request** and **Purchase line**), and the rules grid.

3. **Optional:** If demo rules are present, review each rule and decide whether to keep, modify, or delete it.

   (Optional) The default demo rules match job code records by internal identifier. Before these rules will produce results in your instance, you must replace the demo identifiers with the correct identifiers for your organization's job code records. Use the reference field lookup to select the correct job code records rather than entering values manually.

   If the demo rules do not reflect your organization's prioritization criteria, delete or deactivate them and add rules from scratch.

4. Identify the job code records in your instance that correspond to the organizational tiers you want to prioritize.

   Navigate to the job codes list in your instance and note the records that represent each organizational tier — for example, executive, senior individual contributor, manager, and individual contributor levels. You will select these records when configuring rule conditions.

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5. Add a rule row to the rules grid.
6. Configure the rule row by selecting each cell and providing the required values.
   - To set a condition, select the operator cell and choose an operator, then select the condition value cell and enter a value. To match on business owner job code, use the dot-walked field `business_owner.job_code`. Use the reference field lookup to select the correct job code records rather than entering values manually.
   - To set the result, select the result value cell and choose the priority level to assign when the rule matches.

   For detailed information about working with decision table cells, conditions, and results in Workflow Studio, see Modify decision table rules in Workflow Studio.
7. In the **Rank** column, set the evaluation sequence for each rule.

   To change a rank value, double-click the number to edit it, enter a new value, and press **Enter**. Place rules for higher-urgency tiers at a lower rank number so they are evaluated first.
8. Select **Save** to save the rule.

   Repeat steps 5 through 8 for each additional rule.

   Next, verify that the priority recalculation business rules are active for the sourcing request and purchase line tables.
9. Navigate to **System Definition** > **Business Rules** and search for **Recalculate priority on update** filtered by the sourcing request table and the purchase line table.

   Confirm both rules show as active.
10. Test the configuration by creating or updating a sourcing request where the business owner has a job code that matches one of your configured rules.

    After the background rule runs, verify that the **Priority** field on the sourcing request reflects the expected value. Also test a sourcing request whose business owner job code does not match any rule and confirm that its priority remains at **Planning**.

    If a sourcing request has no business owner, no job code can be evaluated and the record receives Planning priority.

Result

Sourcing requests are automatically assigned a priority level when they are created or updated. Procurement specialists can sort and filter their work queue by priority to work the most urgent sourcing requests first.

Add a button in Shopping Hub

You can add a button in Shopping Hub, similar to the existing Don't see what you need? button.

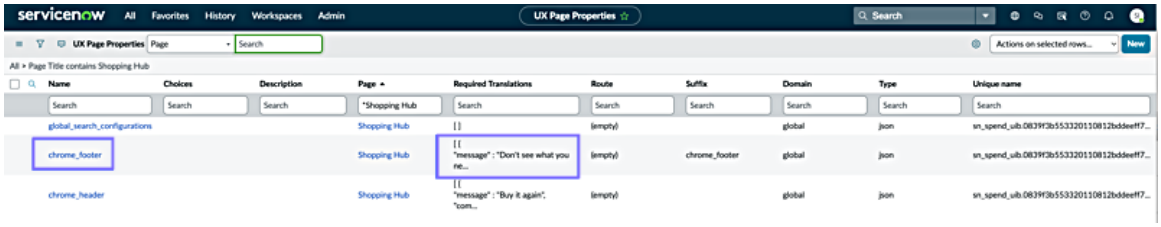
Before you begin

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

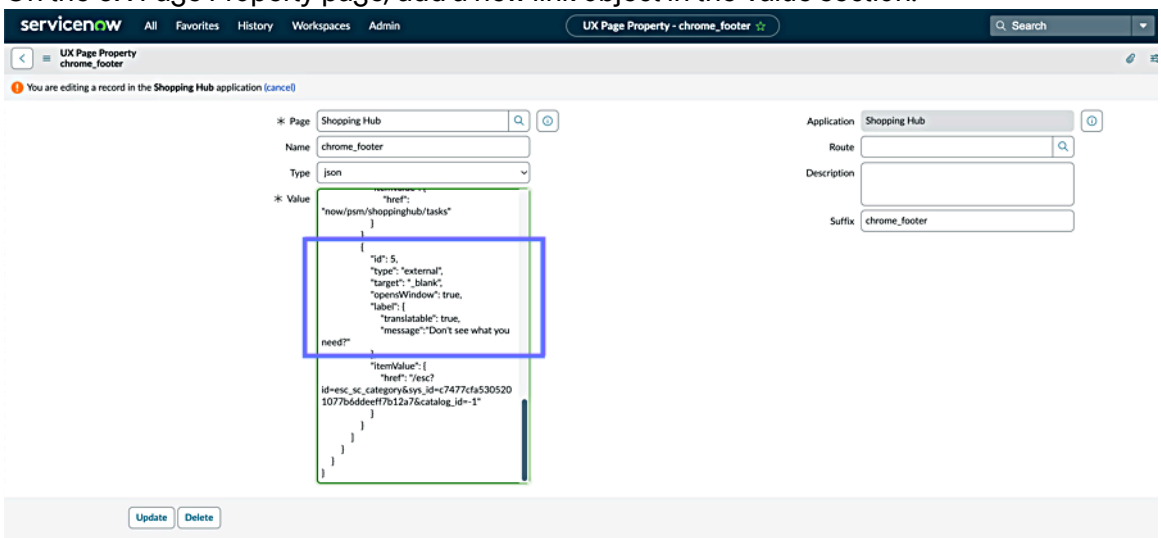
Procedure

1. In the navigation filter, enter `sys_ux_page_property_list.do`.
2. On the UX Page Properties, select the existing configuration for the **Don't see what you need** button.

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3. On the UX Page Property page, add a new link object in the Value section.



4. Add a new link object after the final entry to add the new button, following the structure shown below:

```
{
                    "id": 6,
                    "type": "external",  // or "internal" if
 it's a ServiceNow page
                    "target": "_blank",  // or "_self" if
 opening in same window
                    "opensWindow": true,  // or false for
 internal links
                    "label": {
                        "translatable": true,
                        "message": "Your New Button Text"
                    },
```

5. Select **Update**.

Result

The newly added button is displayed in Shopping Hub.

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.

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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

Setting up primary data for ShoppingHub

Service portal configuration for ShoppingHub

Configure punchout for third-party site purchases

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.

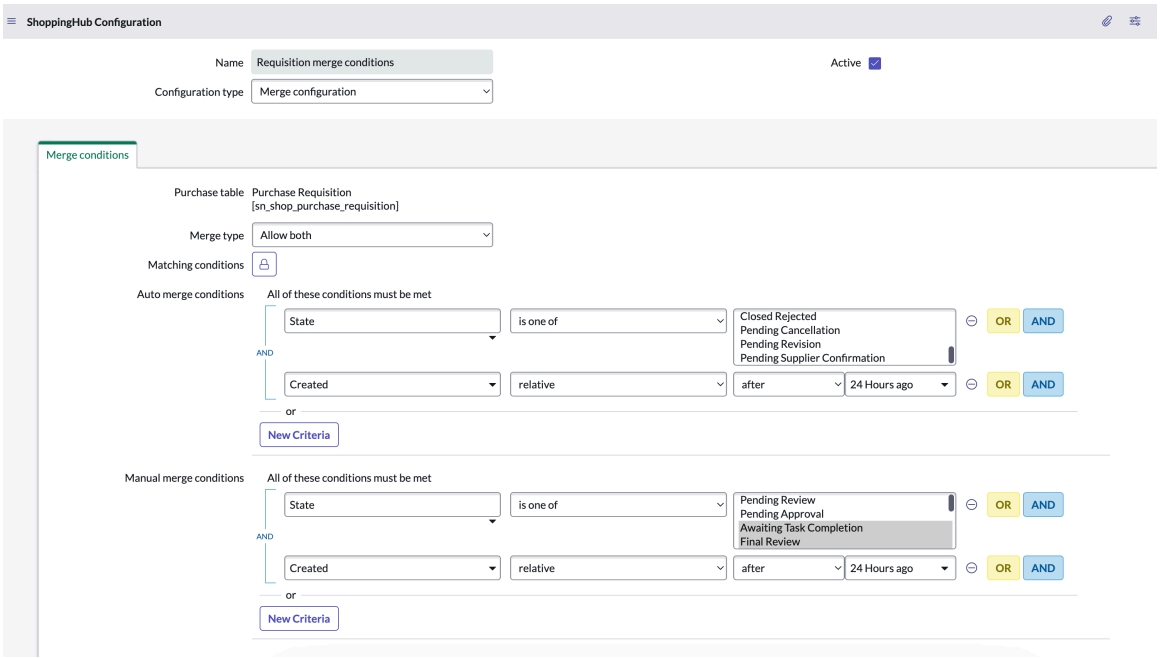
You cannot merge the PRs that are in any of the following states:

- 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.

Merge condition 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.

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Field	Description
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 ShoppingHub

As an admin, you can configure your service portal such that shoppers who are on the portal can quickly access ShoppingHub and even view purchasing and approval to-dos assigned to them.

You can perform these configurations:

- Add a ShoppingHub Navbar link
- Add a ShoppingHub icon link
- Add a ShoppingHub widget
- Verify and update search sources

Related topics

Install Sourcing and Procurement Operations

Setting up primary data for ShoppingHub

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: sn_shop.shopping_hub_admin and 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**.

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5. Select **New**.
6. On the Menu Item form, fill in these fields:
   a. In the **Label** field, enter **ShoppingHub**.
   b. In the **Type** field, select **URL**.
   c. In the **Order** field, enter **300**.
   d. In the **HREF / URL** field, enter **/now/shopnow?ref=sp_navbar**.
   e. In the **URL target** field, enter **blank** so that it opens in a new tab.

   Note: It is recommended that you use these settings. However, you can configure this otherwise as well.

7. Select **Submit**.

Add a 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: sn_shop.shopping_hub_admin and 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**.

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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: sn_shop.shopping_hub_admin and 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.

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: sn_shop.shopping_hub_admin and 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.

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Before you begin
Role required: sn_shop.shopping_hub_admin

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

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

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

Related topics
- Install Sourcing and Procurement Operations
- 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: sn_shop.shopping_hub_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

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Advanced Work Assignment for Source-to-Pay Operations

Use the Advanced Work Assignment for Source-to-Pay Operations feature to automatically assign work items to agents based on availability and capacity.

Advanced Work Assignment for Source-to-Pay Operations pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. For more information, see Exploring Advanced Work Assignment.

Prerequisites for installing Advanced Work Assignment for Source-to-Pay Operations

Before you install Advanced Work Assignment for Source-to-Pay Operations, ensure that you activate the Agent Chat application and load the demo data during installation. For more information, see Activate Agent Chat and load demo data.

Required plugins

Install the Advanced Work Assignment for Source-to-Pay Operations (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

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.

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- Agent availability: States that indicate agent presence, and whether the agent is available for work, busy, or offline. AWA uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in the Source-to-Pay Workspace.

For more information, see Exploring Advanced Work Assignment.

Configure Advanced Work Assignment for Source-to-Pay Operations

Configure various components, such as service channels, work item queues, and assignment rules that determine how emails and chat interactions should be routed to agents.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment**.
2. Create a service channel to automatically route incoming work to agents.

   For more information, see Create or configure a service channel.

   The following service channels are specific to Advanced Work Assignment for Source-to-Pay Operations.

   - Procurement Cases: For more information,see Automatic case creation from emails.
   - Chat. For more information,see Using Advanced Work Assignment for Source-to-Pay Operations.

   Note: Procurement administrators can also configure custom service channels for any work that may come through modes other than emails and chat, like SMS, or phone, for example.

   After you've created a service channel, do the following:

   a. Configure the agent capacity to determine the number of work items that can be automatically assigned to agents supporting a service channel. For more information, see Override agent capacity for selected agents.
   b. Create or change an inbox layout to determine the information shown on work item cards displayed in an agent's inbox. For more information, see Create or change an inbox layout.
   c. Create a work item size override if you want to calculate an agent's workload using a work item size other than the default. For more information, see Create or change a work item size override.
3. Define or modify a queue so that you can determine which work items are routed automatically to agents through a given service channel.
   For more information, see Create a work item queue.
4. Set the Advanced Work Assignment criteria for assigning work items to agents.
   For more information, see Configure agent assignment rules.
5. **Optional:** Configure the following parameters to improve your Advanced Work Assignment functionality:

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a. Create or modify the availability states that agents use to indicate whether they can receive work, or are offline or away. Agents set these states in their Workspace Inbox. For more information, see Configure agent presence states.

b. Define the reasons that agents can use to decline work assignments that they receive in their Workspace inbox. For more information, see Configure reasons for rejecting work items.

c. Prevent an agent from being assigned too many work items by configuring the agent's maximum universal capacity. For more information, see Configure an agent's maximum universal capacity.

d. Create or manage groups that have associated Advanced Work Assignment queues. For more information, see Create or change groups for Advanced Work Assignment queues.

For detailed instructions on how to configure Advanced Work Assignment, see Configuring Advanced Work Assignment.

Configure the Sourcing and Procurement Operations queues

Configure the Advanced Work Assignment for Source-to-Pay Operations queues to ensure that email and chat requests are routed and assigned to specific agents belonging to defined groups.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Queues**.
2. Select one of these queues specific to Advanced Work Assignment for Source-to-Pay Operations.
   - General Ledger Accounting Queue
   - Legal Review for Procurement Queue
   - Strategy Sourcing Queue
   - Service Desk & Others Queue
3. In the Assignment Eligibility related list, select **New**.
   a. In the **Agent assignment rule** field, select **Chat - Most Capacity**.
   b. Select the lock icon ( ) next to the **Groups** field.
   c. Select the look-up icon ( ) to view the list of groups.
   d. Select **New**.
   e. In the **Name** field, enter a name for the group.
   f. Fill in the remaining fields, as appropriate.
   g. Select **Submit**.
   h. Select the lock icon ( ) to lock the **Groups** field.
   i. Right-select and select **Save**.
4. Next to the **Groups** field, select the link to the group, which opens the group record.
   a. In the Group Members related list, select **Edit** to add members to the group.
   b. Select one or more users in the Collection list and move them to the Group Members List.

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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

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.

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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"

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.

Install Universal Request for Sourcing and Procurement Operations

Install the Universal Request for Source-to-Pay Operations [sn_fsc_ur_common] plugin to enable the Universal Request in Sourcing and Procurement Operations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Search for the plugin by name or ID using the filter criteria and search bar.
   If the plugin doesn't appear in the results, contact ServiceNow support to request access.
3. Select **Install**.

Note: If domain separation and delegated admin are enabled, the admin user must be in the global domain before installing. If not, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for Universal Request for Source-to-Pay Operations.`

Result

A confirmation message appears when installation is complete. For information about the components installed with this plugin, see Components installed with Universal Request.

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Integrate Sourcing and Procurement Operations with other applications

Sourcing and Procurement Operations integrates with internal applications and third-party ERP systems to extend procurement capabilities and enable cross-departmental collaboration.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Sourcing and Procurement Operations integrations

Sourcing and Procurement Operations (SPO) supports the following integrations:

Source-to-Pay Operations with Contract Management Pro

This integration provides streamlined cross-team collaboration and enables legal professionals to run their contracting work within the sourcing and purchasing process. Procurement specialists can initiate contract requests manually throughout the sourcing and purchasing process.

For more information, see Source-to-Pay Operations integration with Contract Management Pro.

Project Costing for Sourcing and Procurement Operations

This integration automates the calculation of planned versus actual cost by linking purchase orders to cost plans within Project Portfolio Management.

For more information, see Sourcing and Procurement Operations integration with Project Management.

Risk Assessments Integration for Sourcing and Procurement Operations

This integration triggers risk assessments on a supplier during the sourcing or purchase requisition workflow using Third-party Risk Management.

For more information, see Sourcing and Procurement Operations integration with Third-party Risk Management.

Procurement File Transfer Framework

This application 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 do not support Representational State Transfer (REST) or Simple Object Access Protocol (SOAP) based integration methods.

For more information, see Procurement File Transfer Framework.

Procurement for Field Service Management

This integration between Shopping Hub Mobile and Field Service Management helps field service agents order a part or item that is not available in inventory from a vendor or supplier.

For more information, see Sourcing and Procurement Operations integration with Field Service Management.

Third-party application integrations

Sourcing and Procurement Operations integrates with the following third-party ERP and procurement applications.

ERP Integration Framework

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The Source-to-Pay Operations ERP Integration Framework connects ServiceNow® with third-party ERP systems, enabling data exchange for purchase orders, receipts, invoices, fixed assets, and tax information across multiple ERP instances.

For more information, see ERP Integration Framework.

Sourcing and Procurement Operations integration with SAP

Send purchase orders, receipts, and invoices created in Sourcing and Procurement Operations to SAP ECC and SAP S/4HANA, and look up or extract primary data from SAP into ServiceNow®.

For more information, see Source-to-Pay integration with SAP.

Sourcing and Procurement Operations integration with Oracle EBS

Handle sales orders, procurement, finance, and other operations in Oracle EBS from your ServiceNow® instance.

For more information, see Source-to-Pay integration with Oracle EBS.

Sourcing and Procurement Operations integration with SAP Ariba

Manage procurement, sales orders, and financial operations in SAP Ariba from your ServiceNow® instance.

For more information, see Source-to-Pay integration with SAP Ariba.

Sourcing and Procurement Operations integration with Coupa

Manage business spend and automate approvals, contracts, inventory, purchase orders, requisitions, suppliers, and user management in Coupa from your instance.

For more information, see Source-to-Pay integration with Coupa.

Sourcing and Procurement Operations integration with Oracle Financial Cloud

Pull entity data, such as receipts, from Oracle Financial Cloud into ServiceNow®.

For more information, see Source-to-Pay integration with Oracle Financial Cloud.

Sourcing and Procurement Operations integration with Asset Management

The Asset Management Integration for Sourcing and Procurement Operations plugin (sn_spend_asset) provides an integration between Asset Management (Asset Management) and Sourcing and Procurement Operations (SPO) applications, enhancing operational efficiency.

This integration enables asset managers to access Shopping Hub catalog items, including the catalog items without assigned prices, directly within the Asset Management workspace. By enabling procurement actions without switching platforms, it streamlines workflows and improves the user experience for asset managers and end users.

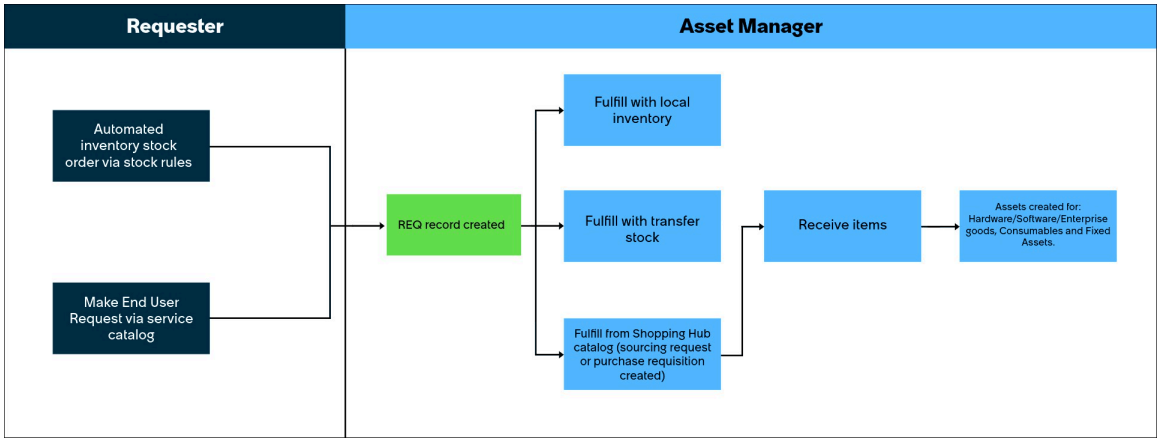
Asset Management and SPO better together workflow

The procurement journey begins through an automated inventory stock order or when an end user submits a request for items from the service catalog. The asset manager then evaluates whether the request can be fulfilled by using available local stock, generating transfer orders, or creating purchase orders. After the asset manager identifies the appropriate purchase action, the better together experience begins.

The following figure illustrates the Asset Management and SPO workflow.

Important: This is an interactive image. Select each box or step in the image to learn about that process or task.

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1. Select this box to learn about stock rules.
2. Select this box to learn how to create an inventory stock order request.
3. Select this box to learn how to track a request.
4. Select this box to learn how to source requests from local stockrooms.
5. Select this box to learn how to create a transfer order from a request.
6. Select this box to learn how to create SR or PR via Asset Management Workspace.
7. Select this box to learn how to receive assets in Asset Management.
8. Select this box to understand the asset creation process in Asset Management.

Role required for the SPO-Asset Management better together feature

The Asset Manager role (sn_spend_asset.spo_shopper) is required to work on assigned requests from the ITAM workspace by creating sourcing requests or purchase requisitions in SPO.

Note: Additional roles may be required based on the specific asset management product installed.

Plugin dependencies for the SPO-Asset Management better together feature

The following are the plugin dependencies that are required to use Asset Management Integration for Sourcing and Procurement Operations (sn_spend_asset):

- Sourcing and Purchasing Automation (sn_pr)
- Procurement (procurement)
- Shopping Hub (uib.sn_spend_uib)

Additional plugins may be required based on the specific asset management product installed:

- Base Asset (no additional plugins required)
- Enterprise Asset Management (com.sn_eam)
- Hardware Asset Management (com.sn_hamp)
- Software Asset Management (samp)

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Inventory stock orders

Typically, inventory stock orders are automatically submitted based on the stock rules configuration. Stock rules define the conditions under which a specified quantity of an asset is transferred from another stockroom or ordered from a supplier when the inventory in a particular stockroom falls below a defined threshold. For more information, see Stock rules.

The following are the prerequisites for creating a stock order via stock rules:

- Application: Hardware Asset Management or Enterprise Asset Management
- Catalog Item: Hardware Inventory Stock Order
- Category: Asset Lifecycle

Note: For an inventory stock order, the delivery address and quantity of items are predefined and can't be modified.

End user requests via Service Catalog for assets

An asset manager or end user can manually submit a request. If a user has the Inventory user role, they can purchase more than 10 items. For more information, see Create an inventory stock order request. If the user is purchasing 10 items or fewer, a general service catalog request works.

Requesters can only make requests via service catalog for published and approved models. If an approved model is not available, contact Procurement or the Asset Management team to request the items, based on your business process. For more information, see Publish models to the hardware or software catalog.

The following are the prerequisites for creating a request for more than 10 items:

- Application: Hardware Asset Management or Enterprise Asset Management
- Catalog Item: Hardware or Enterprise Inventory Stock Order
- Category: Asset Lifecycle

Note: For requests of more than 10 items, the delivery address and item quantities are predefined and cannot be modified.

The following are the prerequisites for creating a standard end-user request for fewer than 10 items:

- Application: Software Asset Management, Hardware Asset Management, Enterprise Asset Management, or Base Asset
- Catalog Item: Standard Hardware, Software, or Enterprise Request
- Category: Asset Lifecycle

Supported applications and flows in the Asset Management and SPO better together feature

The Asset Management and SPO better together feature supports the following applications and flows:

Asset Management applications

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- Software Asset Management (SAM)
- Hardware Asset Management (HAM)
- Enterprise Asset Management (EAM)
- Base Asset

Asset Management flows covered as part of this better together solution include the following:

- Hardware, Software, and Enterprise Asset Standard Flows
- Hardware and Enterprise Inventory Stock Orders

Create Sourcing Request or Purchase Requisition in SPO via Asset Management Workspace

As an Asset Manager, you can create an SR or PR in SPO from the Asset Management Workspace to fulfill asset requests submitted through Employee Center.

Before you begin

Role required: sn_spend_asset.spo_shopper

About this task

After an employee submits a request through the Employee Center or an automated stock rule is triggered, the Asset Manager can view the request in the Service Catalog application and start sourcing and procuring the requested items from the appropriate Asset Management Workspace.

The Asset Management workspace used depends on the type of items being requested, such as hardware, software, or enterprise assets.

- Asset Workspace
- Hardware Asset Workspace
- Software Asset Workspace
- Enterprise Asset Workspace

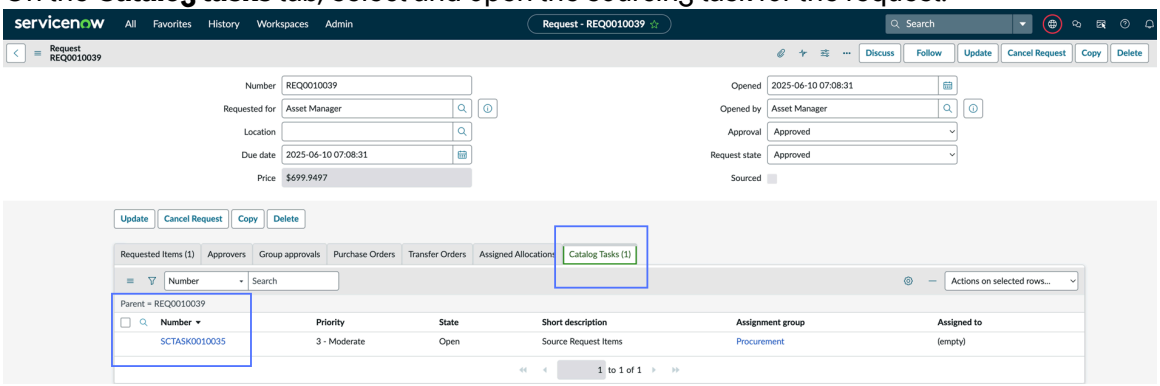
To ensure a seamless integration between Asset Management and SPO, the following updates have been implemented:

- SPO's Purchase Requisition (PR), Sourcing Request (SR), and Purchase Order (PO) tables are mapped to their corresponding tables in Asset Management to enable smooth data flow between the two products.
- When a PR, SR, or PO is created in SPO, the associated data and states are synchronized with the corresponding PO in Asset Management.
- The Asset Management Purchase Order (PO), generated during the creation of a sourcing request or purchase requisition, provides visibility to both the employee and the asset manager.
- Asset Management Purchase Order Lines (POLs) are generated after a supplier has been awarded in the sourcing request flow.
- The Asset Management PO includes references to SPO's SR, PR, and PO records.
- The Asset Management POL includes references to SPO's purchase requisition line (PRL) or POL records.

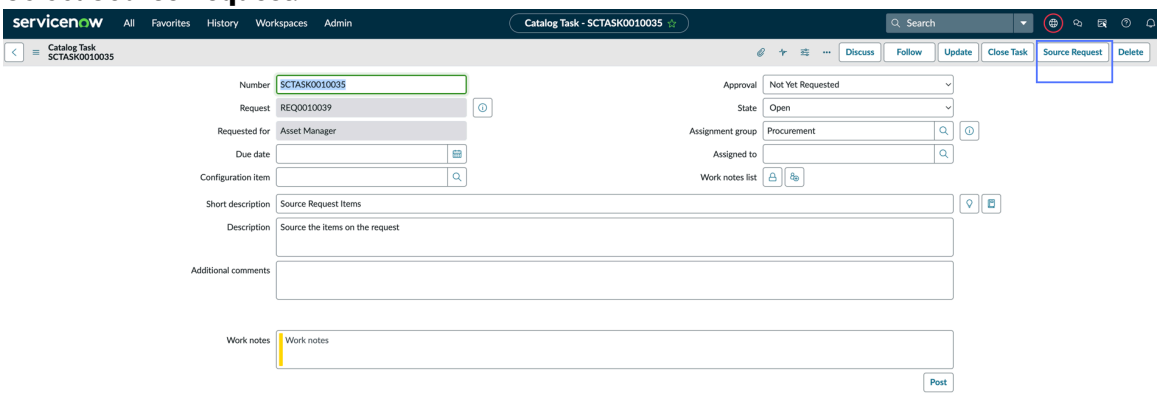
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Procedure

1. Navigate to **All** > **Open Records** > **Requests**.
2. Open the request.
3. On the **Catalog tasks** tab, select and open the sourcing task for the request.

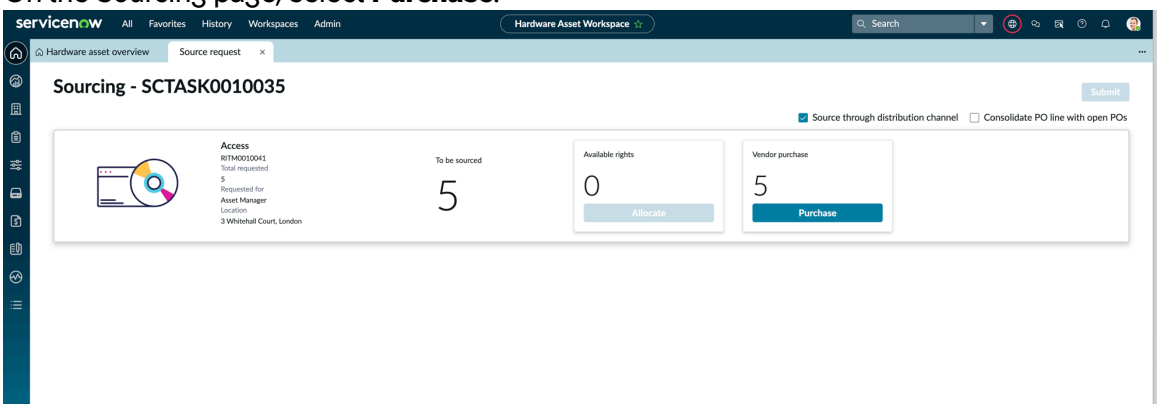


4. Select **Source Request**.



A confirmation message is displayed informing you that you're being redirected to the appropriate Asset Management workspace.

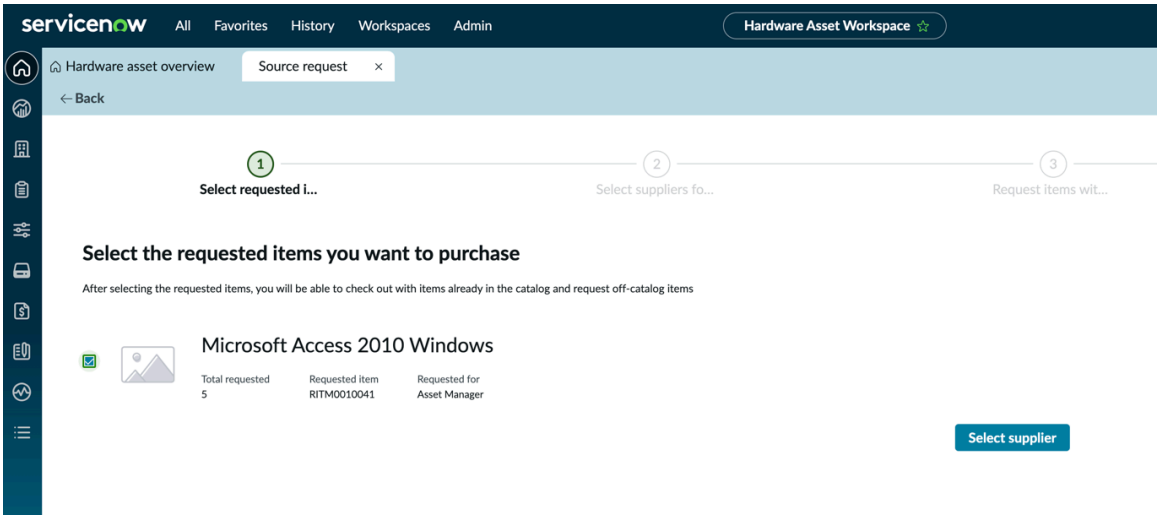
5. Select **OK**.
6. On the Sourcing page, select **Purchase**.



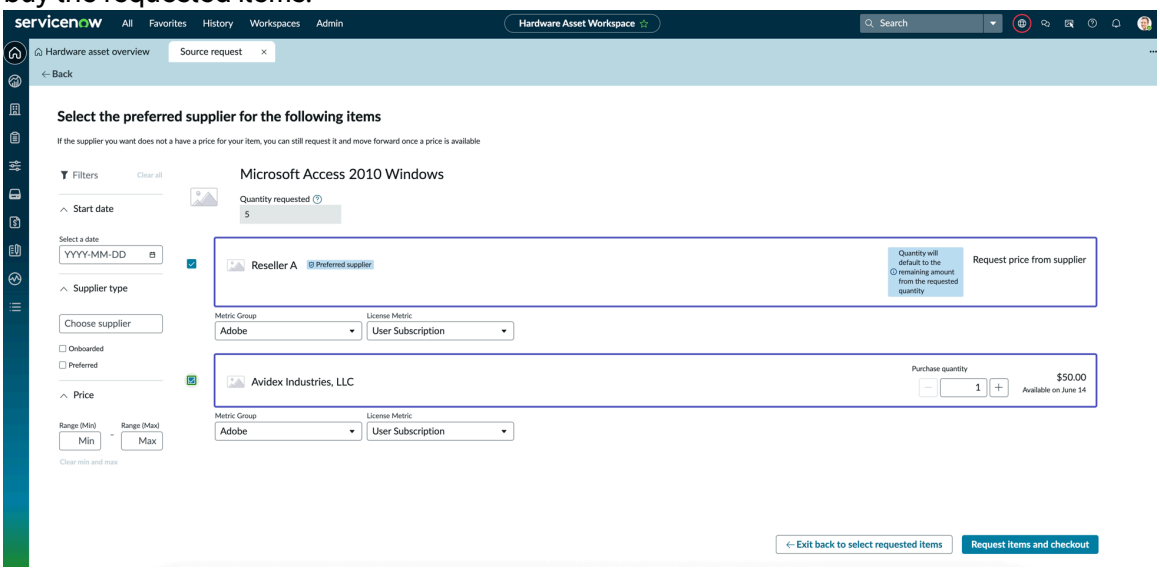
You' are guided through stages that enhance the better together experience using SPO's Shopping Hub workflows, helping you efficiently source the products you need.

7. On the Select the requested items you want to purchase page, select the items that you requested.
8. Select **Select Supplier**.

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9. On the Select suppliers for requested items page, select the suppliers from whom you want to buy the requested items.



Note: The purchase quantity you specify should not exceed the quantity specified on the original request in the Service Catalog application. In the **Purchase quantity** field, if you specify a quantity that exceeds the original quantity, you see a message that informs you that the total quantity selected exceeds the quantity to be sourced.

10. Select **Request items and checkout**.
    One of the following occurs depending on whether the requested items have a price associated with them.

    - For products that do not have an associated price, the sourcing flow is triggered. For more information, see Create sourcing request from the Asset Management Workspace.
    - For products, that have an associated price, the purchasing flow is triggered. For more information, see Create purchase requisition from the Asset Management Workspace.

11. Select **Checkout**.

Create sourcing request from the Asset Management Workspace

As an asset manager, use SPO's sourcing flow from the Asset Management Workspace to complete checkout when the requested item doesn't have contractual pricing.

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Before you begin

Role required: sn_spend_asset.spo_shopper

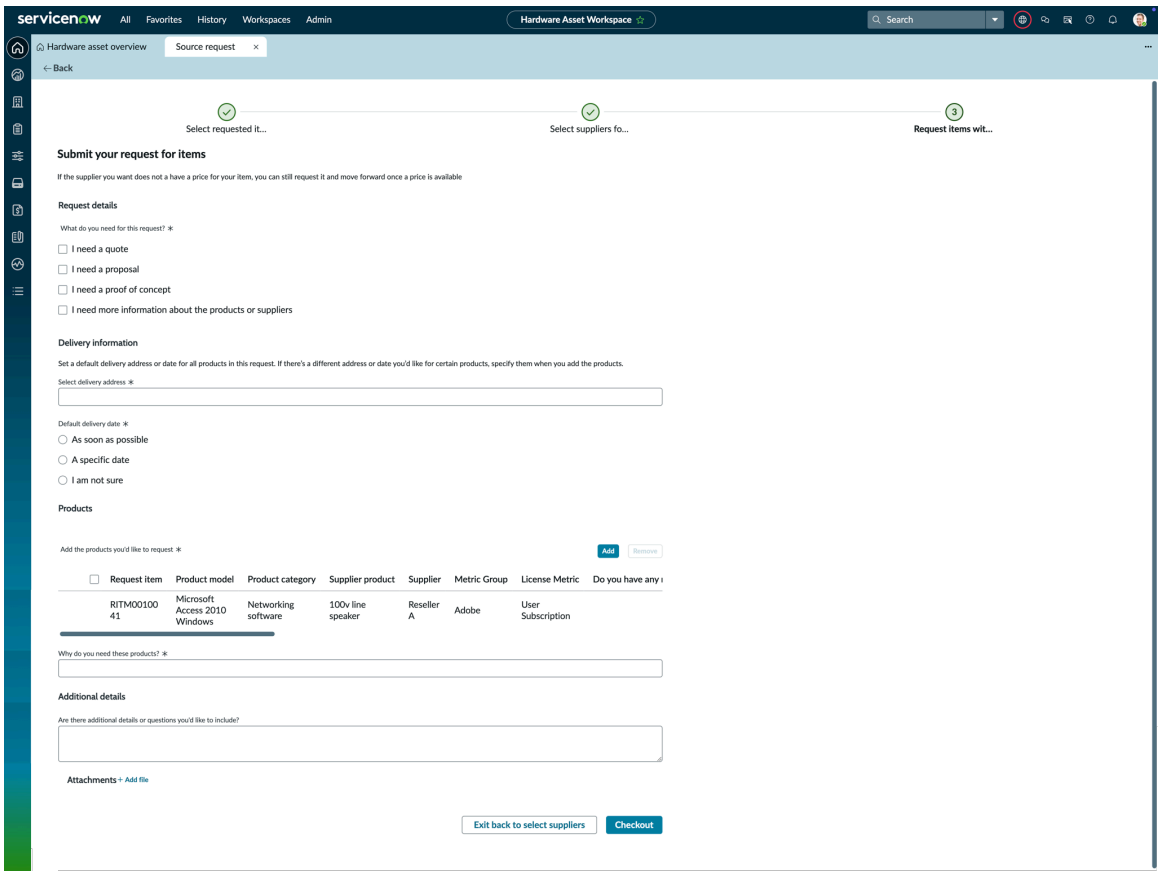
About this task

This task describes the options you need to select and the information you need to provide after you select **Request items and checkout** when the requested item does not have an associated price.

During checkout, asset managers interact with a user interface that is similar to Shopping Hub's "I need a product" record producer to provide key details about the product to be sourced.

Procedure

1. Complete steps 1 through 10 as described in Create Sourcing Request or Purchase Requisition in SPO via Asset Management Workspace.
2. On the Select the preferred supplier for the following items page, select **Request items and checkout**.



3. On the form, fill in the fields in these sections.

Request items and checkout form

Section	Option
Request details	From the What do you need for this request? list, select any of the following options: ○ I need a quote ○ I need a proposal

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Section	Option
	○ I need a proof of concept ○ I need more information about the products or suppliers
Delivery information	○ From the **Select delivery address** list, select a delivery address. **Note:** For an inventory stock order, the delivery address is predefined and cannot be modified. ○ From the Default delivery date list, select one of the following options: ▪ As soon as possible ▪ A specific date ▪ I am not sure
Products	○ Add the products you would like to request. Select the **Open Preview** option to see a preview of the product and make any changes to the metric group, license metric, quantity, and so on. Select Update to save your changes. **Note:** You can select **Add** to add additional products; however, the quantity that you specify must not exceed the number specified in the original request. However, for an inventory stock order, the quantity of items is predefined and cannot be modified. ○ In the **Why do you need these products?** field, enter a reason for buying these products.
Additional details	Enter any details or questions you want to mention.
Attachments	Select **+Add file** to add any attachments you would like to upload.

Note: You cannot modify quantities through this record producer. To make quantity changes, go to the Supplier selection page.

4. Select **Checkout**.

   A sourcing request (SR) is created.

What to do next
The Procurement Specialist accesses the SR in the Source-to-Pay Workspace and initiates the sourcing process.

Create purchase requisition from the Asset Management Workspace

As an asset manager, use SPO's purchasing flow from the Asset Management Workspace to complete checkout when the requested item has contractual pricing.

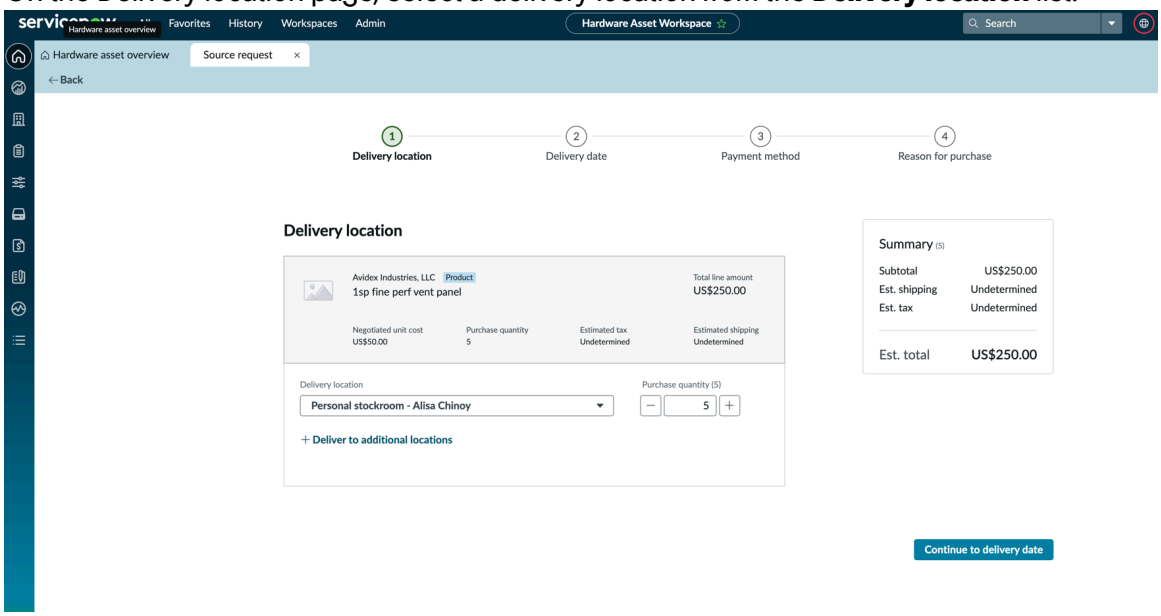
Before you begin
Role required: sn_spend_asset.spo_shopper

About this task
This task describes the options you need to select and the information you need to provide after you select **Request items and checkout** when the requested item has an associated price.

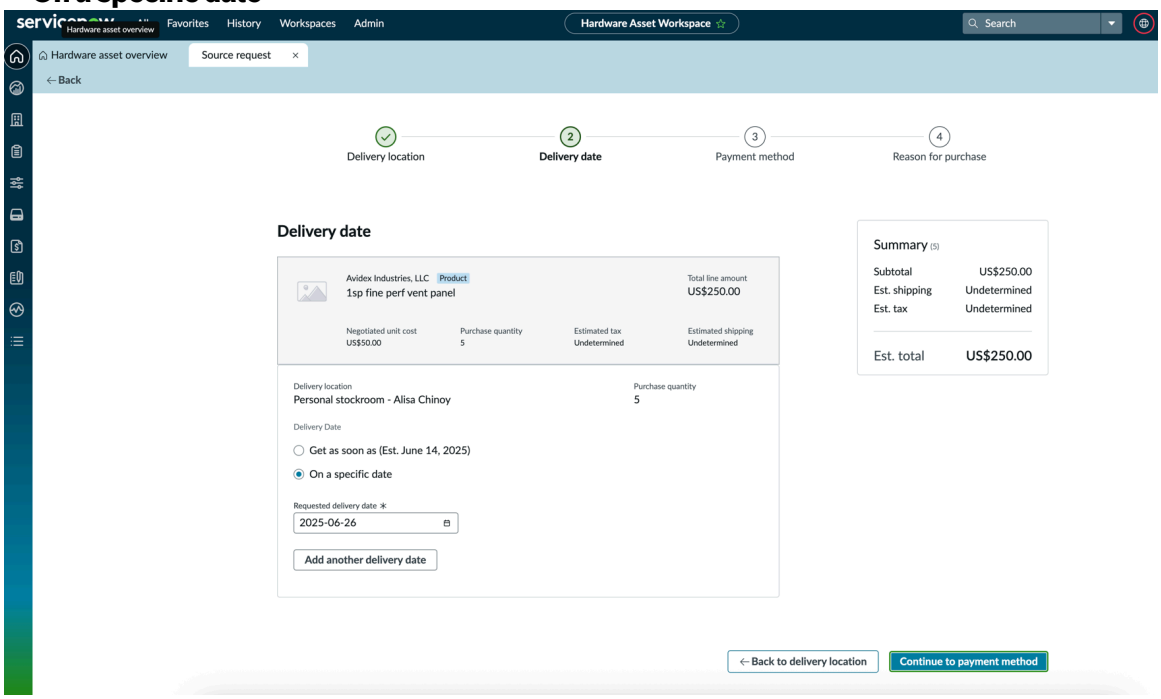
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Procedure

1. Complete steps 1 through 10 as described in Create Sourcing Request or Purchase Requisition in SPO via Asset Management Workspace.
2. **Optional:** Submit sourcing request for items without price.
3. On the Delivery location page, select a delivery location from the **Delivery location** list.



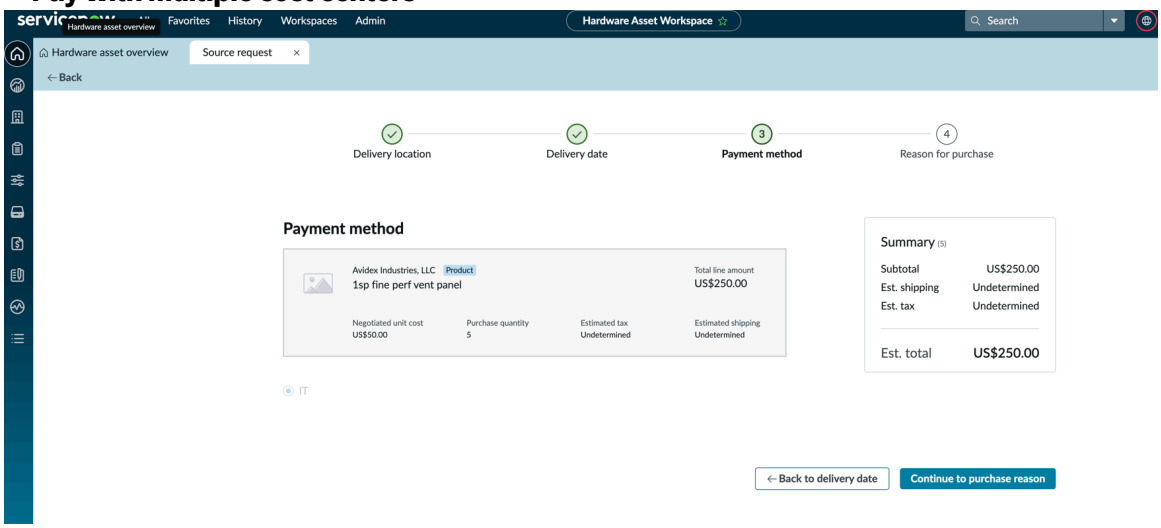
4. **Optional:** Select **Deliver to additional locations** to add additional delivery locations and specify the purchase quantity.
5. Select **Continue to delivery date**.
6. On the Delivery date page, select any of the following options:
   - **Get as soon as** (an estimated date auto-populates based on the current date)
   - **On a specific date**



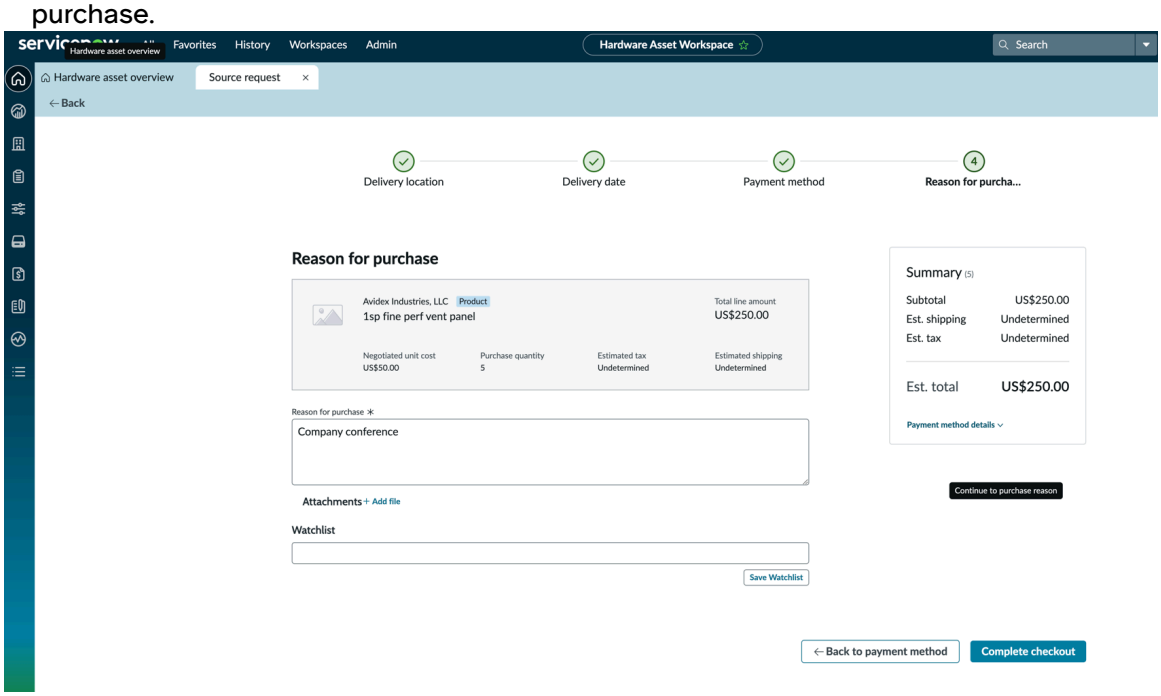
7. **Optional:** Select **Add another delivery date** to add another delivery date.

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8. Select **Continue to Payment method**.
9. On the Payment method page, you can retain the selected cost center or select any of the following options:
   - **Use another cost center**
   - **Pay with multiple cost centers**



10. Select **Continue to purchase reason**.
11. On the Reason for purchase page, do the following:
    - In the **Reason for purchase** field, enter a reason for making this purchase.
    - Select **+Add file** to add any attachments to this purchase.
    - In the **Watchlist** field, ad individuals who you want notified if any updates are made to this purchase.



12. Select **Complete checkout**.
    A purchase requisition is created for the requested items in SPO.

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What to do next

The Procurement Specialist reviews the requisition in the Source-to-Pay Workspace and converts it into a purchase order.

Note: The PO created in SPO (sn_shop_purchase_order table) references the corresponding PO generated in Asset Management (procure_po table). The Asset Manager can monitor the progress of the SR, PR, and PO by closely tracking the PO within Asset Management.

If the asset manager has the Shopping Hub shopper role (sn_shop.shopper), they can also view the status of their request directly in Shopping Hub.

The end user who submitted the original RITM continues to track and monitor the request status on the RITM record. Statuses between SPO and Asset Management objects are synchronized so that updates appear in real time.

Receiving assets in Asset Management

As part of the Better Together integration, all asset receiving is handled within ServiceNow's Asset Management product suite. When an item is initially received in Asset Management, a receipt is automatically generated in SPO in the Pending Submission state.

After the buyer confirms receipt against the purchase order in Asset Management, a corresponding receipt is automatically created for the associated purchase order in Sourcing and Procurement Operations. For more information about receiving assets in Asset Management, see Receive an asset.

After the receipt is posted to the ERP system, the status of the SPO receipt changes to Posted.

Note: The SPO receipt is read-only and cannot be modified.

To support seamless integration between SPO and Asset Management, both the receipt and shipment tables in each application are retained. The required field mappings have been configured to enable data flow between both the applications.

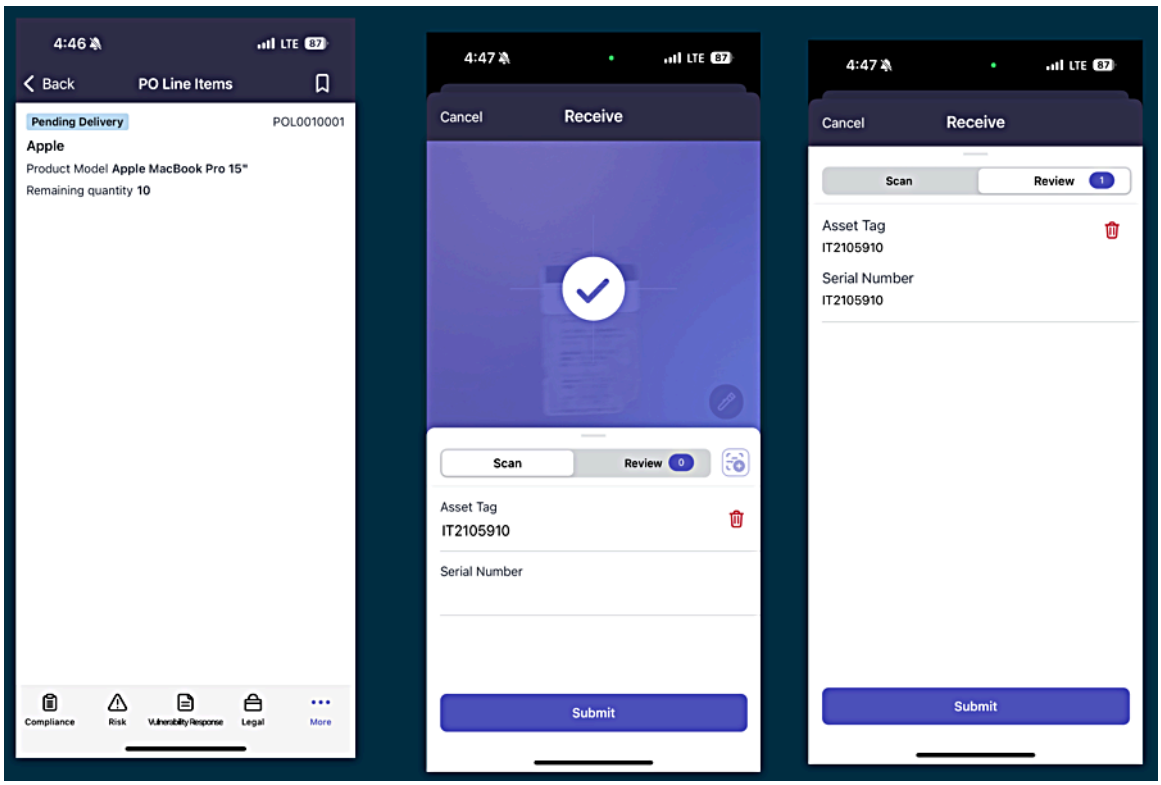
As part of the receiving process, the Asset Management receipt passes relevant data to the SPO receipt, which is read-only. Asset Management also creates the associated assets.

As part of the shipment process, the Asset Management shipment record passes shipment details to the SPO shipment record, which is also read-only.

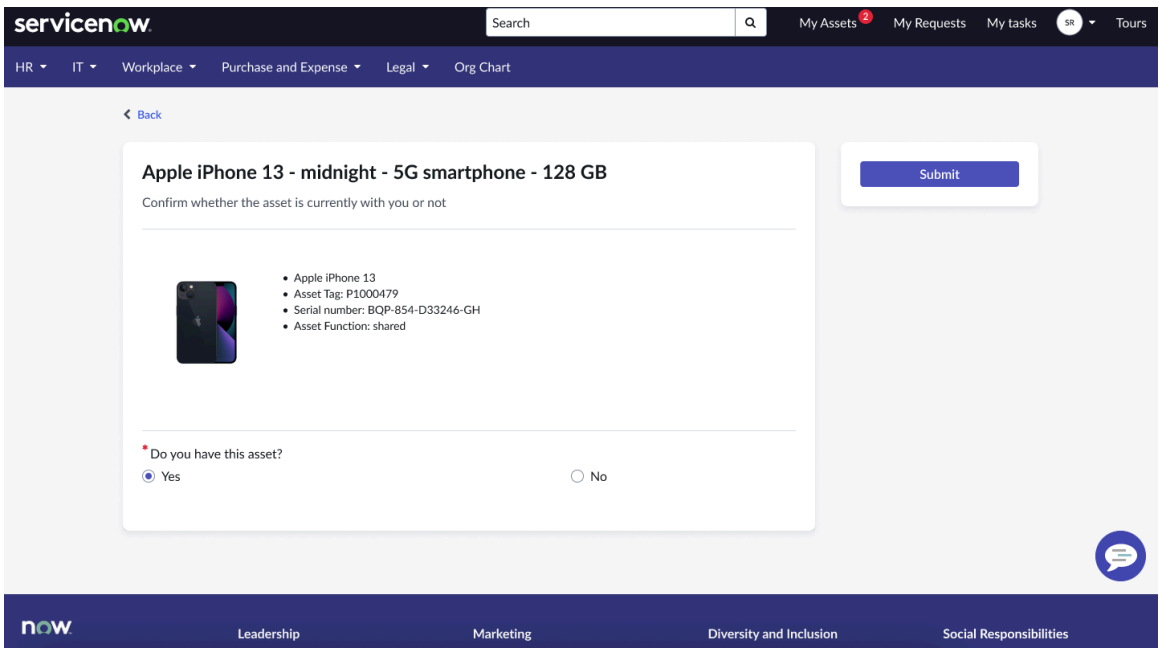
After receiving the requested items, the asset manager or an employee can acknowledge receipt using the following Asset Management receiving experiences:

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- Mobile barcode scanning. For more information, see Acknowledge receipt of an asset on a mobile device.

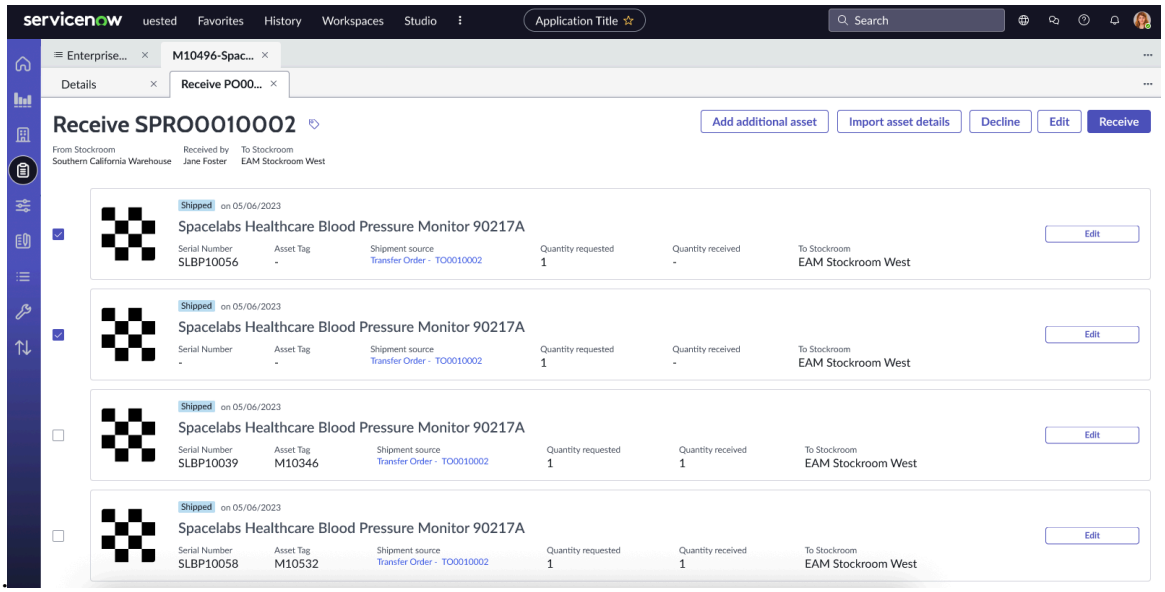


- From the Employee Center portal. For more information, see Acknowledge receipt of assets on the Employee Center portal.



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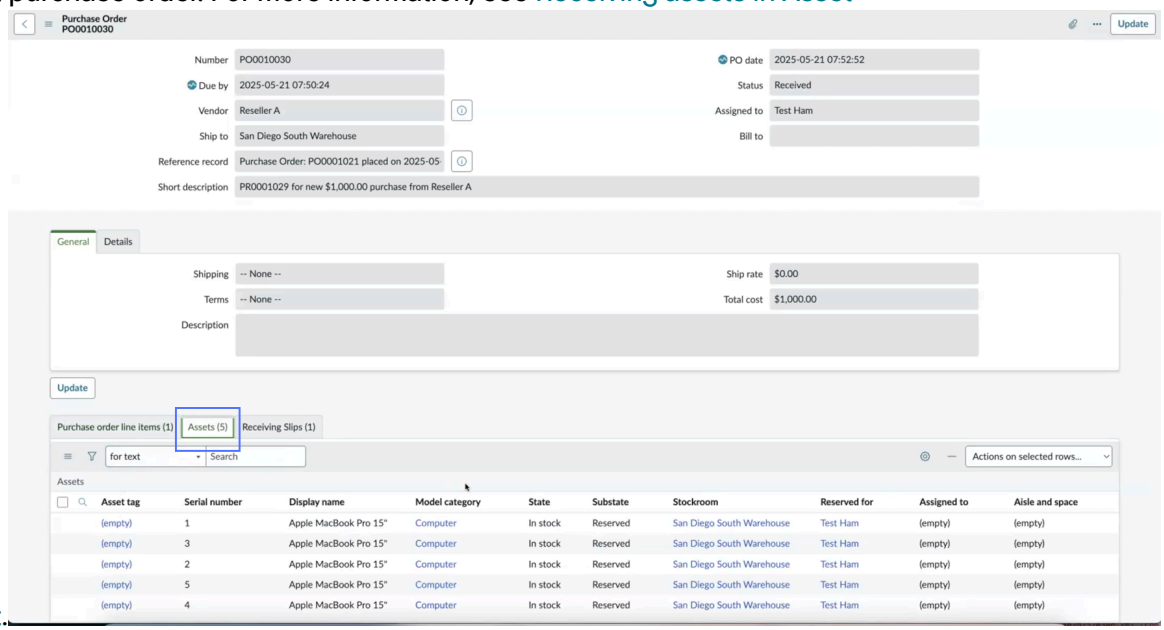
- From the Asset Management purchase order. For more information, see Receive an asset.



Asset creation process in Asset Management

In ServiceNow's Asset Management product suite, assets are created when you acknowledge the receipt of the requested items.

After receiving is completed, receiving slips are generated in Asset Management, the associated assets are created, and the status of the PO is updated to Received. You can view the created assets in the **Assets** tab of the Asset Management purchase order. For more information, see Receiving assets in Asset Management.



Additionally, when receiving slips are generated in Asset Management, corresponding read-only receipts are created in SPO.

The following occurs during the asset creation process in Asset Management:

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- When a Hardware Asset Management (HAM) or Enterprise Asset Management (EAM) asset is received, Asset Management creates a corresponding record in the alm_asset table.
- When a Software Asset Management (SAM) item is received, Asset Management creates a corresponding entitlement in the alm_license table.
- When a consumable is received, Asset Management creates a corresponding entitlement in the alm_consumable table.

Considerations for implementing the Asset Management and SPO better together flow

This section provides information on considerations for implementing the Asset Management and SPO better together solution.

Functional detail	Description
PO and PR transaction behavior	To enable seamless integration: • The **Cancel** and **Order** options are disabled for POs in Asset Management. • Edit and return flows for Purchase Requisitions (PR) and Purchase Orders (PO) in SPO are not supported in this integration. Therefore, the **Confirm Revision** option is disabled when the PR is in the Pending Review state.
Acknowledging asset receipt in Asset Management	• After asset delivery, the purchaser acknowledges receipt via the PO in Asset Management. Assets are then created and can be viewed under the **Assets** tab of the Asset Management PO. • In this workflow, no assets or receipts are created from the SPO PO. • A read-only receipt is generated on the SPO POL only after the Asset Management receipt slip is created.
Shopping Hub and Asset Management	As part of this flow, all asset, consumable, and enterprise purchases should go through the service catalog. Services purchases should continue to flow through Shopping Hub. Shopping Hub controls should prevent asset purchases directly from the Shopping Hub catalog.
Supplier Product and Vendor Catalog Item table usage	When a purchase is initiated using the Asset Management and SPO flow, the system doesn't use the Vendor Catalog Item (pc_vendor_cat_item) table. Instead, it uses SPO's Supplier Product (sn_shop_supplier_product) table to process the purchase.
How Asset Management and SPO better together flow affects SAM-Coupa integration	The Asset Management and SPO integration flow does not support the Software Asset Management (SAM) and Coupa integration. If you are currently using the SAM-Coupa integration and wish to continue doing so, do not install the Asset Management Integration for Sourcing and Procurement Operations (sn_spend_asset) plugin. If you choose to install the better together application, complete the following steps to successfully implement the SPO-Coupa integration:

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Functional detail	Description
	• Stop the "Create a Requisition" business rule from triggering on the Asset Management Purchase Order table (proc_po) when the status changes to Ordered. • Restrict the creation of new itam_procurement_integration_job scheduled jobs. Retire any existing daily jobs to avoid potential conflicts. • Delete all business rules associated with the app-itam-procurement-integration application to prevent integration conflicts. • Ensure that Purchase Requests (PRs), Purchase Orders (POs), and Receipts in SPO are properly mapped to corresponding entities in Coupa for seamless integration.
Creation of assets for services	The creation of inventory assets for services in the alm_asset table is disabled in the Sourcing and Purchasing Automation and Asset Management Integration for Sourcing and Procurement Operations plugins. The previously created inventory assets for services are not affected. For fixed assets, Asset Management continues to create corresponding records in the alm_asset table for services. Inventory asset creation for goods continues to function as before.

Sourcing and Procurement Operations integration with Employee Center

As an employee, shopper, or requester, you can view procurement case types, knowledge articles, open to-dos, and purchasing tasks assigned to you. You can also track your requests and access your purchases on the Employee Center (EC) portal by integrating Sourcing and Procurement Operations with Employee Center.

Ensure that your admin has installed Employee Center, which is available as a zBoot plugin, for you to enjoy the seamless unified employee portal experience. Further, they may choose to install the employee content taxonomy plugin to access a prebuilt taxonomy for your service catalog, including the Purchases and Expenses topic.

Note: To know more about EC and how to set it up as an admin, visit the Employee Center home page.

Purchase and expense

You can view the following subtopics from the **Purchase and Expense** tab:

- Invoices
- Supplier Services
- Corporate Cards
- Purchase Requests
- Travel and Expenses

Each subtopic includes both catalog items and knowledge articles. Sourcing and Procurement Operations's applications pre-populate some of these subtopics with content.

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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 perform various actions. These include editing, canceling, or returning a purchase, buying something, and requesting a product or service. You can also submit a quote, request a copy of a contract, and ask queries to the procurement team. Additionally, you can learn about sourcing requests and purchase orders.

From **Quick links**, you can directly go to the list of third-party supplier sites, or visit ShoppingHub.

My tasks

As an approver, you can view your open and completed approval tasks, and also work on your open items, from **My tasks**. If you're logged in as an employee or shopper instead, you can work on completing your procurement tasks.

Note: Admins can create new to-do widgets to show up in Employee Center, or configure existing widgets from **Employee Center** > **Activity Configurations**. For more information, see Employee tasks page.

In **My tasks**, you can filter your search by the following:

- Task type
  - Approval
  - Invoice
  - Milestone
  - Receipt
  - Sourcing
- Due date
  - Overdue
  - Due soon: Tasks that are due in the next seven days.
- Priority
  - Critical
  - High
  - Medium
  - Low
- Created: Tasks that are created within the last four hours.

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.

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My active items

As a shopper, you can view specific items from the widgets under the **My active items** section. Some of these are:

- **Tasks**: List of open tasks assigned to you, along with reminders on their statuses. You can update the fields to be displayed in the task cards by adding them to the to-dos configuration record.
- **Purchases**: Number of purchases made by you.
- **Requests**: Number of requests raised by you.

Others include surveys, invoices, purchase orders, risk assessments, issues, shipments, and so on. Selecting these takes you to their details page on ShoppingHub, where you can work with them as required.

Note: Admins can also configure these active items widgets in Employee Center. For more information, see My active items widget configuration.

Search for punchout products in Employee Center

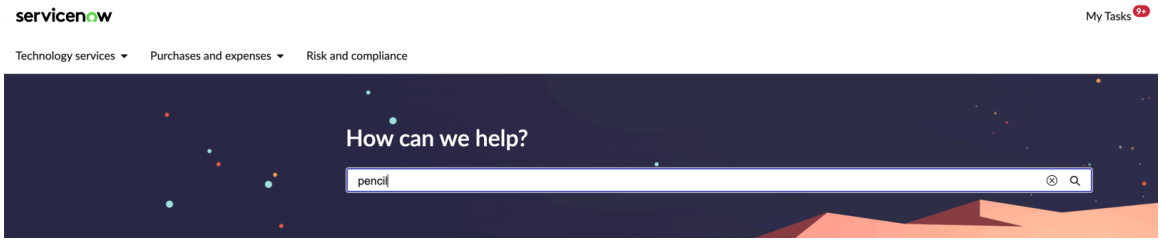
You can search for punchout products directly in Employee Center using the AI search bar.

Before you begin

Role required: sn_shop.shopper

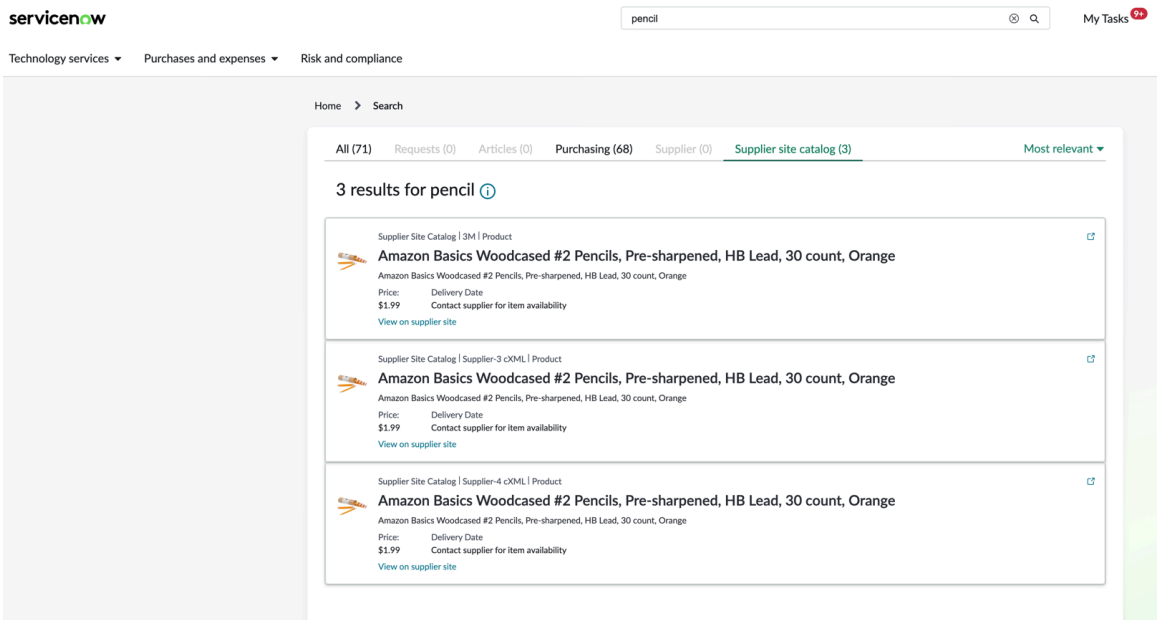
Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the search bar, search for any punchout product that you want to buy.



3. The punchout products that match your search criteria are listed in the **Supplier site catalog** tab.

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Important: Only cXML punchout products are displayed in the **Supplier site catalog** tab. The punchout products uploaded via API are not listed.

4. Select a product to purchase.

   You are redirected to the supplier site to add items to the cart. Depending on your setup, the following occurs:

   - If you've installed Shopping Hub, you are redirected back to Shopping Hub from the supplier site to complete the checkout process.
   - If you haven't installed Shopping Hub, you must complete the checkout process and place the order on the supplier site.

   For more information about the checkout experiences for shoppers based on whether they have installed Employee Center, Shopping Hub, or both, see Shopper checkout experiences based on installed applications.

Tracking your procurement requests in Employee Center

As a shopper, you can enjoy complete visibility into the progress of your requests by tracking your procurement cases in Employee Center.

As a shopper or employee, you can view the current status and track the progress of your procurement requests or cases in Employee Center. Not only can you view the complete list of steps involved in closing a case, but also those that have been passed or skipped on the way to closure.

You can navigate to your cases from **All** > **Self-Service** > **Employee Center** > **My Requests**. Alternatively, you can go to **All** > **ShoppingHub** > **ShoppingHub Home**, and select **My purchases** from your profile list. Here, you can view all the procurement cases created against your purchases in the corresponding **Cases** tab. Select **View details** on a specific case to view the current state of the case, details on when it was created and last updated, progress, and so on. In both cases, you're directed to your request details page in Employee Center.

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.

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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.

Action	Description
Request clarification	Opens a confirmation dialog box, where you can enter your questions regarding the select ed purchase requestion lines or sourcing re quest. An email notification is sent to the re quester that some clarification is sought for the purchase, and a provide clarification to-do is created for their action.

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Action	Description
	Note: This correspondence is tracked through the activity stream of the ap proval plan here in Employee Center. The same is also tracked through the ac tivity stream of the corresponding pur chase requisition or sourcing request in Shopping Hub.
Reject	Opens a confirmation dialog box, where you can enter your reason for rejecting only the selected purchase requestion lines. An email notification is sent to the requester with this information.
Reject all	Opens a confirmation dialog box, where you can enter your reason for rejecting all the pur chase requestion lines or sourcing request. An email notification is sent to the requester with this information. **Note:** You're redirected here if you se lect **Reject** on the approval email notifi cation.
Approve	Opens a confirmation dialog box, where you can approve only the selected purchase re question lines. An email notification is sent to the requester with this information.
Approve all	Opens a confirmation dialog box, where you can approve all the purchase requestion lines or sourcing request. An email notification is sent to the requester with this information. **Note:** You can review the details and approve the purchase request directly from the email notification.

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.

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

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the approval task experience seamless for you, and at the same time expedites the purchase experience of the requester or shopper who immediately receives the approval notification.

Note: When providing your approval from the email notification, ensure that the subject line of the response email has "approve" in it. Also ensure that there's no mismatch in the approver's email address.

You may also reject the request, which redirects you to Employee Center to complete the action. Here, you can also request clarification on the purchase request from the requester, if need be. For more information on this, see Approve a request from Employee Center.

These email notifications are triggered for new, due soon, and overdue approval to-dos in templates that customers can easily configure to meet their specific business requirements.

- Customers can modify the email content in flow designer or email scripts, according to their requirements.
- They can also choose to fetch and use other details that aren't displayed in the email by default, such as order type for purchase requisitions, product type or request type for sourcing requests, and so on. For detailed information on email templates and how to work with them, see Email templates.
- Customers can also configure the email layout, and change the background color or font color, for example. The html field in the email layout record must be modified to achieve this. For detailed information on email layouts and how to work with them, see Email layouts.

Provide more details on your purchase from Employee Center

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

Before you begin

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

Role required: sn_shop.shopper

About this task

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

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, requested supplier, requested product, quantity, total line amount, and so on.
   You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. In the **What is the purpose of this purchase?** field, provide the necessary information to address the procurement buyer's queries.
5. Select **Submit**.

What to do next

You can view the completed task in the **Completed** tab.

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Confirm meeting a milestone for your service from Employee Center

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

Before you begin

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

Role required: sn_shop.shopper

About this task

This confirm milestone completion task is automatically created by the system on the target completion date. This task is active for a day, after which it becomes overdue.

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, milestone, expected completion date, payout amount, and so on.
   You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. Do one of these actions.

Action	Description
Comments	Provide your response, if any, and select **Con firm**.
Request to cancel	Request to cancel the milestone altogether. On the **Request to cancel milestone** window, provide your reason for canceling the mile stone, and select **Submit**.
Propose new completion date	Push the milestone to a later date. On the **Propose a new expected completion date** window, pick a new completion date, pro vide your reason for changing the date, and select **Submit**. **Note:** Milestones can be received in percentage and amount, but can only be deferred if not complete until they're processed for the full milestone. This is because milestones are parts of the whole, and partials aren't supported.

What to do next

You can view the completed task in the **Completed** tab after the fulfiller has also reviewed and confirmed that the task is complete.

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Review your service acknowledgment task from Employee Center

Review and acknowledge the receipt status of your ordered service from your supplier from Employee Center.

Before you begin

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

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

Role required: sn_shop.shopper

About this task

The due date of your service acknowledgment task is set based on the due date defined by you when placing the order.

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. On the **Pending confirmation** tab, select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, purchase order number, supplier, order created, total amount, remaining amount, and so on.
   You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. Do one of these actions.

Action	Description
I didn't receive any services	Displays the **Confirm you didn't receive any services** dialog box to record your confirma tion for that particular month. On confirma tion, the task is marked as Closed Complete and moved to the **Completed** tab. The sched uled job will run to create a new task for you the following month.
Mark as received	Displays the **Specify the quantity you re ceived** dialog box, where you can enter the received quantity for the selected purchase line for that particular month (if the unit of the supplier product is individual unit), or the re ceived percentage (if the unit of the supplier product is fixed fee). This information is now displayed in the **Confirmed** tab.

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Action	Description
	Note: If you select multiple purchase lines, you can't specify individual amounts or percentages for them, and the entire lines must be marked as re ceived. Also, if the purchase order line has fixed fee as the unit, then it's auto matically set up for percentage.
Mark this task as complete	Displays the **Confirm you didn't receive all services** dialog box to record your confirma tion for that particular month. On confirma tion, the task is marked as Closed Complete and moved to the **Completed** tab.

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

What to do next

You can view the completed task in the **Completed** tab.

Confirm receipt of your order from Employee Center

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

Before you begin

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

Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. On the **Pending confirmation** tab, select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, purchase order number, and so on.
   You can view the current status of your ordered items, along with the tracking number and carrier name, from the **Shipment details** tab. You can also track the updates on the selected task from the **Activity** tab. Further, you can view and upload attachments associated with the task from the **Attachments** tab.
4. Select the purchase line that you received and select **Mark as received**.
   Displays the **Specify the quantity and date you received this product** dialog box, where you can enter the received quantity and date when you received the selected purchase line. This information is now displayed in the **Confirmed** tab.

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.

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What to do next
You can view the completed task in the **Completed** tab.

View a link or video from Employee Center

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

Before you begin
Role required: sn_shop.shopper

Procedure

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

What to do next
You can view the completed task in the **Completed** tab.

Upload a document from Employee Center

Complete the task that your procurement specialist has assigned to you by uploading a document, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin
Role required: sn_shop.shopper

Procedure

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

What to do next
You can view the completed task in the **Completed** tab.

Sign a document using DocuSign from Employee Center

Provide your consent by signing a document using DocuSign, directly from Employee Center. This action is listed as a task under **My Tasks**.

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Before you begin
Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any, and so on.
4. On the displayed document, select **Continue**.
5. Select **Start**.
6. Follow the arrowhead and select **Sign**.
7. Select **Finish**.

What to do next
You can view the completed task in the **Completed** tab.

Sign a document from Employee Center

Provide your consent by signing a document, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin
Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any, and so on.
4. On the displayed document, you can choose to type your signature or draw it.
   Based on what you select, you can either write your full name in the **Full name** field, or draw a digital signature in the box provided.

   Note: If you aren't happy with what you see in the document, you can select **I don't want to sign this document**. You must enter your reason for declining, followed by **Decline and complete** to complete the task.

5. Select **Accept and complete**.

What to do next
You can view the completed task in the **Completed** tab.

Complete a form from Employee Center

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

Before you begin
Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. Select the task that you want to work with.

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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.

Ask procurement card form

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.

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.

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What to do next

A procurement case of type Inquiry is created under **Procurement Cases** in Source-to-Pay Workspace, which is assigned to a fulfiller. The fulfiller can then help you with your inquiry.

Virtual Agent for Sourcing and Procurement Operations

ServiceNow® Virtual Agent for Sourcing and Procurement Operations enables shoppers to quickly find and purchase products that they're looking for from a vendor on ShoppingHub, by interacting with a virtual agent from Employee Center. It also allows shoppers to view purchases, procurement tasks, procurement cases, and even work on their to-dos. They can also get help from the procurement team using Virtual Agent.

Important: Check your entitlements to determine whether you have access to Virtual Agent.

For more information on Virtual Agent in general, its components, benefits, and basic user interface, see Virtual Agent.

Sourcing and Procurement Operations Virtual Agent conversations and topic blocks

A topic conversation defines the dialog between the Virtual Agent (chat support bot) and the user, which enables you to gather information for a specific business need.

You can create and reuse topic blocks to simplify the topic authoring and maintenance process. Topic blocks enable you to reuse standard procedures across conversation topics.

As part of the Sourcing and Procurement Operations product, the following Virtual Agent topic conversation and reusable topic blocks are provided:

- Request to purchase from a vendor
  - ShoppingHub: Product Search
  - ShoppingHub: Checkout - Delivery Location
  - ShoppingHub: Checkout - Quantity
  - ShoppingHub: Checkout - Shipping Method
  - ShoppingHub: Checkout - Delivery Date
  - ShoppingHub: Checkout - Purchase Reason
  - ShoppingHub: Checkout - Payment Method
- See my purchases
  - View PR or PO
  - View Purchase Details
- See my procurement tasks
  - More Info
  - PSM Select Supplier Task
  - PSM Purchase Approval
  - PSM Invoice Review Task
  - PSM Confirm Receipt Task
  - PSM Confirm Milestone Task
- See my procurement cases: View Procurement Case
- Get help from procurement: Browse PSM Content

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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:

Plugins required for virtual agent

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 (sn_shop_va)	Activates a conversational bot platform for providing user assistance through conversations for Sourcing and Procurement Operations.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed.
5. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.
6. Select **Install**.

Enable Virtual Agent for Sourcing and Procurement Operations

Enable Virtual Agent for Sourcing and Procurement Operations to start chatting with the Virtual Agent.

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Before you begin

Role required: admin, virtual_agent_admin

The base system provides predefined Virtual Agent topics (chatbot conversations). To customize, duplicate, and edit a topic, see Virtual Agent Designer.

Procedure

1. Navigate to **All** > **Conversational Interfaces > Virtual Agent > Designer**.
2. In the **Category** field, select **PSM Virtual Agent Topics**.
3. In the **Type** field, select **Topics**.
4. Select any topic to open it and view the conversation flow.
   - To use the topic in a conversation with no changes, select **Publish**.
   - To test the active, published conversation topic, select **Test**.
   - To duplicate the topic so you can customize it, select **Duplicate**. Enter a name for the duplicate topic and select **Save**.

Note: It is recommended that you use the conversation flow as delivered for optimum results.

NLU support for Sourcing and Procurement Operations Virtual Agent

You can set up Sourcing and Procurement Operations Virtual Agent to use Natural Language Understanding (NLU) to understand word meanings and word contexts to infer user intent.

NLU provides information that your virtual agent uses to determine what users want to do and to extract relevant values from their input. With NLU, your virtual agent offers a more natural and engaging conversational experience.

For more information, see Natural Language Understanding in Virtual Agent.

The following intents are provided as part of the Sourcing and Procurement Operations Model:

- #Browse Shoppinghub
- #ViewPurchase
- #Purchasing task
- #ViewProcurementCase
- #Get help from procurement

Set up NLU for Sourcing and Procurement Operations Virtual Agent

Set up Natural Language Understanding (NLU) for Sourcing and Procurement Operations Virtual Agent before chatting with the Virtual Agent to optimize the search experience.

Before you begin

Role required: admin, virtual_agent_admin

You must have the following plugin installed on your instance: Natural Language Understanding Models for Sourcing and Procurement Operations. For information on how to install the plugin, follow this procedure.

Procedure

1. Train and publish the NLU model.
   a. Navigate to **NLU Workbench > Models**.
   b. Select **Sourcing and Procurement Operations Model**.

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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 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.

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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 ShoppingHub meets the criteria, one or more sourcing requests within a single purchase are automatically grouped into a single sourcing event. These are systematically created in the Sourcing and Purchasing Automation application.
- When the negotiation setup playbook is complete, and the sourcing 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 Sourcing Event Outbound Queue tables. This data can then be processed by the third-party solution accordingly, to initiate an RFx in their platform. Sourcing 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 sourcing event and sourcing requests to after the sourcing 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 sourcing 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 sourcing 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.

  Note: The supplier responses close date is read-only on the sourcing request, but any change of the supplier responses close date on the sourcing 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 sourcing 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.

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> **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 sourcing event flows, see Sourcing request, Negotiations and Sourcing 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 ShoppingHub, 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.
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.

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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.
- Sourcing Event Outbound Queue, which stores the negotiation type, objectives, third party sourcing event record, sourcing event number, and supplier response close 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	Delivery city
Country	String	Delivery country
End date	Other Date	End date of the service
Expected delivery date	Other Date	Expected delivery date of the good
Grouped sourcing request number	String	ServiceNow's sourcing event record number
Integration status	String	Integration processing status
Manufacturer	String	Name of the manufacturer
Manufacturer part number	String	Part number of the manufacturer
Maximum budget	Decimal	Internal budget provided by the requester
Preferred currency	String	Preferred currency of transaction
Processing message	String	Integration processing message
Product category	String	
Product model	String	Product model name. Required for catalog items.

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Sourcing Outbound Queue (continued)

Field	Field type	Description
Product model short description	String	Short description of the product model
Product name	String	Product name. Required for off-catalog items.
Product type	String	Good or service
Purchase reason	String	Internal reason to purchase this item
Quantity	Integer	Quantity provided by the requester
Start date	Other Date	Start date of the service
State	String	Delivery state
Street	String	Delivery street
Sourcing request number	String	ServiceNow's sourcing request record number
Sourcing request short description	String	ServiceNow's sourcing request short description
Sourcing request status	String	Status of the requester's intake record (sourcing request)
Supplier responses close	Other Date	Formerly named Bids end date. This is the due date for all suppliers to provide a response to an RFx.
Third party tool name	String	Name of the third-party tool
Third party tool RFx ID	String	Event number of the third-party tool
Third party tool RFx ID status	String	Event status of the third-party tool
Third party tool RFx URL	String	Event URL of the third-party tool
Unit	String	Unit populated on the product details
UNSPSC	String	UNSPSC code
Zip code	String	Delivery zip code

Sourcing Line Outbound Queue

Field	Field type	Description
Integration status	String	Integration processing status

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Sourcing Line Outbound Queue (continued)

Field	Field type	Description
Processing message	String	Integration processing message
Purchase line number	String	ServiceNow's purchase line record number
Sourcing out queue header	Reference	Reference to the sourcing outbound table
Sourcing request number	String	ServiceNow's sourcing request record number
Supplier company name	String	Supplier name. This can be requested by the requester or existing supplier providing a catalog item
Supplier email address	String	Email address of the supplier
Supplier ERP number	String	Identification number for the supplier in the ERP system
Supplier number	String	ServiceNow's supplier record
Supplier part number	String	Part number of the supplier

Sourcing Event Outbound Queue

Field	Field type	Description
Integration status	String	Integration processing status
Negotiation objectives	String	Objectives or outcome of the negotiation
Negotiation type	String	Type of negotiation, such as quote for example.
Number	String	ServiceNow's sourcing event record number
Processing message	String	Integration processing message
Supplier response close	Other Date	Formerly named Bids end date. This is the due date for all suppliers to provide a response to an RFx.
Third party sourcing event record	String	Third party's sourcing event record number

Sourcing Bid Stage

Field	Field type	Description
Grouped sourcing request number	String	ServiceNow's sourcing event record number

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Sourcing Bid Stage (continued)

Field	Field type	Description
Integration status	String	Integration processing status
Manufacturer	String	Name of the manufacturer
Manufacturer part number	String	Part number of the manufacturer
Preferred currency	String	Preferred currency of transaction
Processing message	String	Integration processing message
Product category	String	
Product model	String	Product model name. Required for catalog items.
Product model short description	String	Short description of the product model
Product name	String	Product name. Required for off-catalog items. This is a required field.
Product type	String	Good or service
Purchase line number	String	ServiceNow's purchase line record number
Quote number	String	Quote number back from Request for Quote (RFQ)
Quote price	String	Quote unit price back from RFQ
Shipping amount	String	Quote shipping amount from RFQ
Sourcing out queue ID	String	Reference to the sourcing outbound table
Sourcing request number	String	ServiceNow's sourcing request record number. This is a required field.
Sourcing request short description	String	ServiceNow's sourcing request short description
Supplier address	String	Supplier location: Address
Supplier city	String	Supplier city found on the quote
Supplier company name	String	Supplier name. This is a required field.
Supplier country	String	Supplier country found on the quote

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Sourcing Bid Stage (continued)

Field	Field type	Description
Supplier County/District	String	Supplier location: County or district
Supplier delivery date	Date/Time	Supplier delivery date of the good
Supplier email address	String	Email address of the supplier found on the quote
Supplier end date	Date/Time	Supplier end date of the service
Supplier ERP number	String	Identification number for the supplier in the ERP system
Supplier fax number	String	Supplier fax number found on the quote
Supplier lead time (days)	String	Supplier lead time
Supplier notes	String	Notes from the supplier, if any
Supplier number	String	ServiceNow's supplier record
Supplier part number	String	Part number of the supplier
Supplier PO box number	String	Supplier PO box number found on the quote
Supplier primary phone number	String	Supplier primary phone number found on the quote
Supplier quantity	String	Supplier quantity found on the quote. This is a required field.
Supplier region	String	Supplier location: Region
Supplier start date	Date/Time	Supplier start date of the service
Supplier State/Province	String	Supplier state found on the quote
Supplier street address	String	Supplier location: Street address
Supplier website	String	Supplier website, if provided on the quote
Supplier Zip / Postal code	String	Supplier zip code found on the quote
Third party tool name	String	
Third party tool RFx ID	String	Event number of the third-party tool
Third party tool RFx ID status	String	Event status of the third-party tool
Third party tool RFx URL	String	Event URL of the third-party tool

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Sourcing Bid Stage (continued)

Field	Field type	Description
Unit	String	Unit populated on the product details. This is a required field.
UNSPSC	String	UNSPSC code

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.
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.

Submit multi-product sourcing requests

Requesters can submit sourcing requests with multiple products in a single sourcing intake form. When a sourcing request form contains multiple products, the third-party sourcing solution automatically creates individual sourcing events for each product.

Before you begin

Role required: sn_shop.shopper

About this task

When a requester submits a sourcing intake form with multiple products, the third-party sourcing solution automatically:

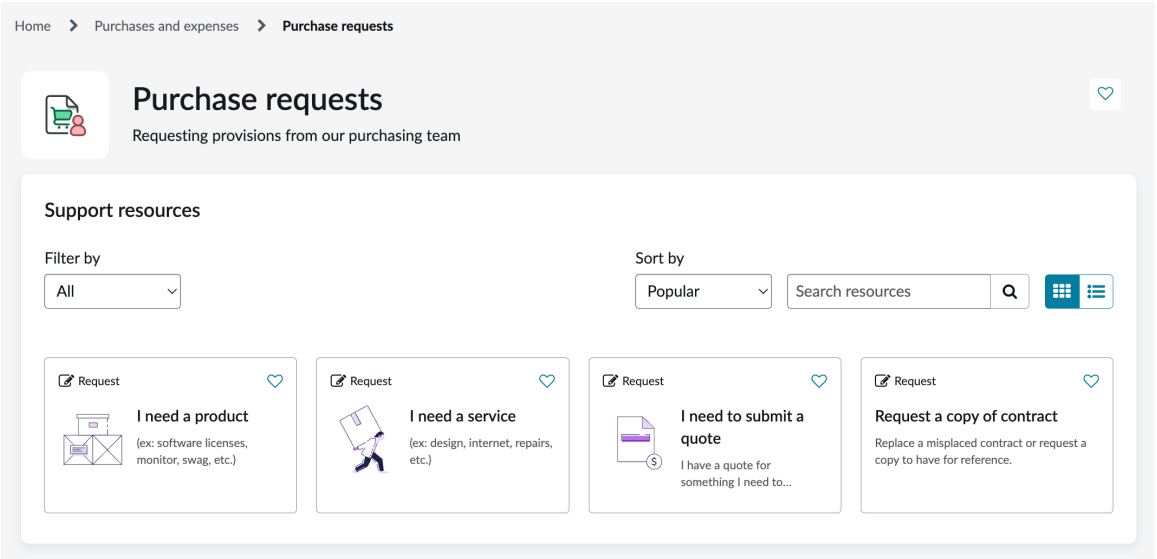
- Creates individual sourcing request for each product.
- Maps each sourcing request to its own sourcing event.

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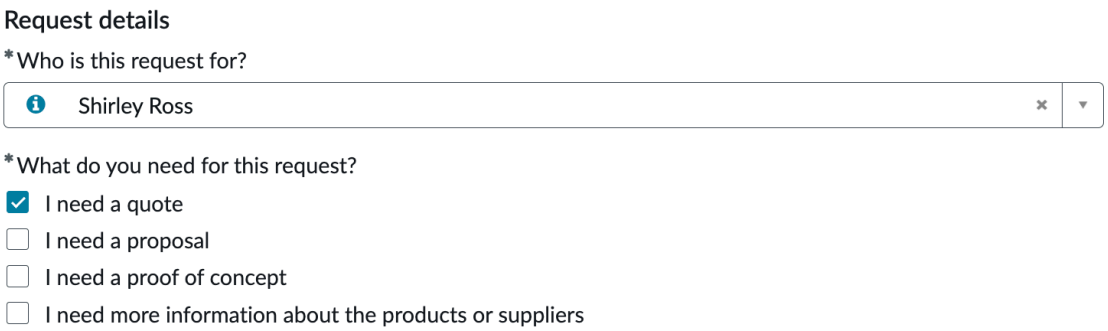
- Links all sourcing requests to a single purchase record.
- Synchronizes data to the third-party tool, generating a separate Request for Quote (RFQ) for each sourcing request.
- Updates third-party RFQ data, such as RFx ID, RFx status, and RFx URL, in the corresponding sourcing request and sourcing event.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the **Purchases and expenses** drop-down list and select **Purchase request**.
3. Select the **I need a product** record producer.

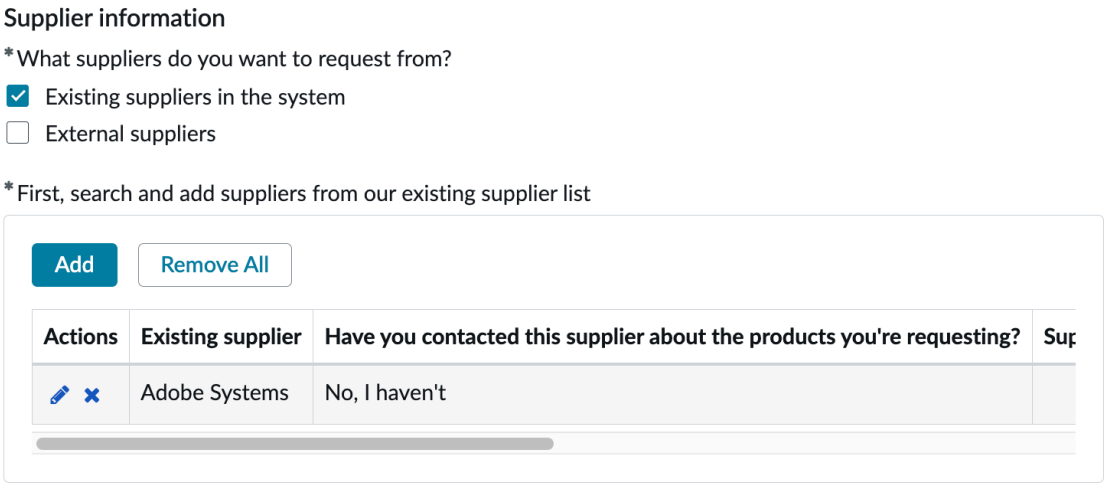


4. Select your request details.



5. Select your preferred supplier.

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To add an existing supplier:

a. Select **Existing suppliers in the system** > **Add**.

b. In the **Existing supplier** drop-down list, select your preferred supplier.

c. Select **Add**.

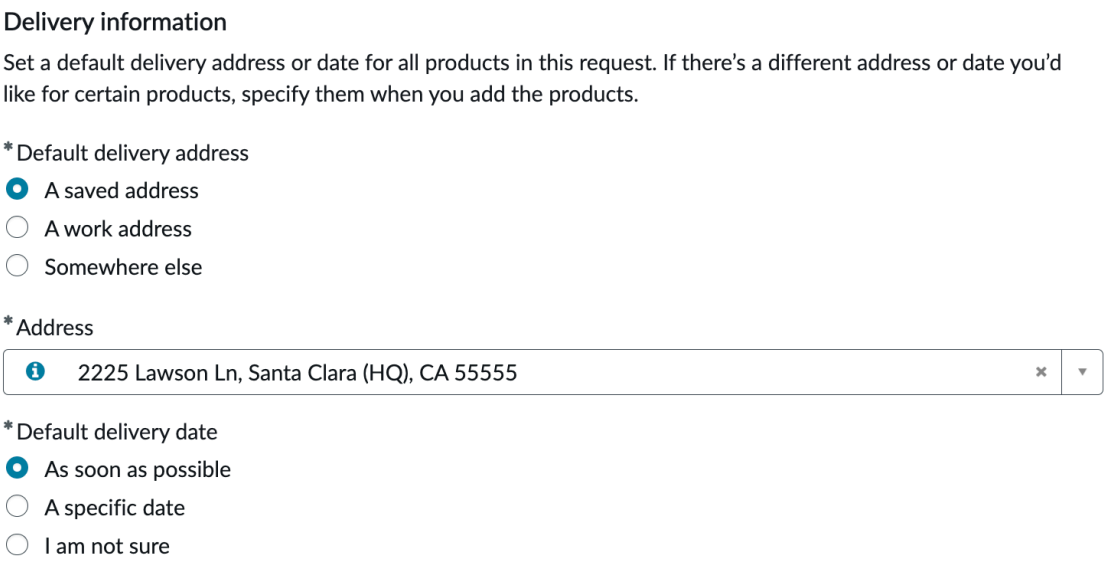
To add an external supplier:

a. Select **External suppliers** > **Add**.

b. Enter the supplier details, such as supplier name, job title, and email.

c. Select **Add**.

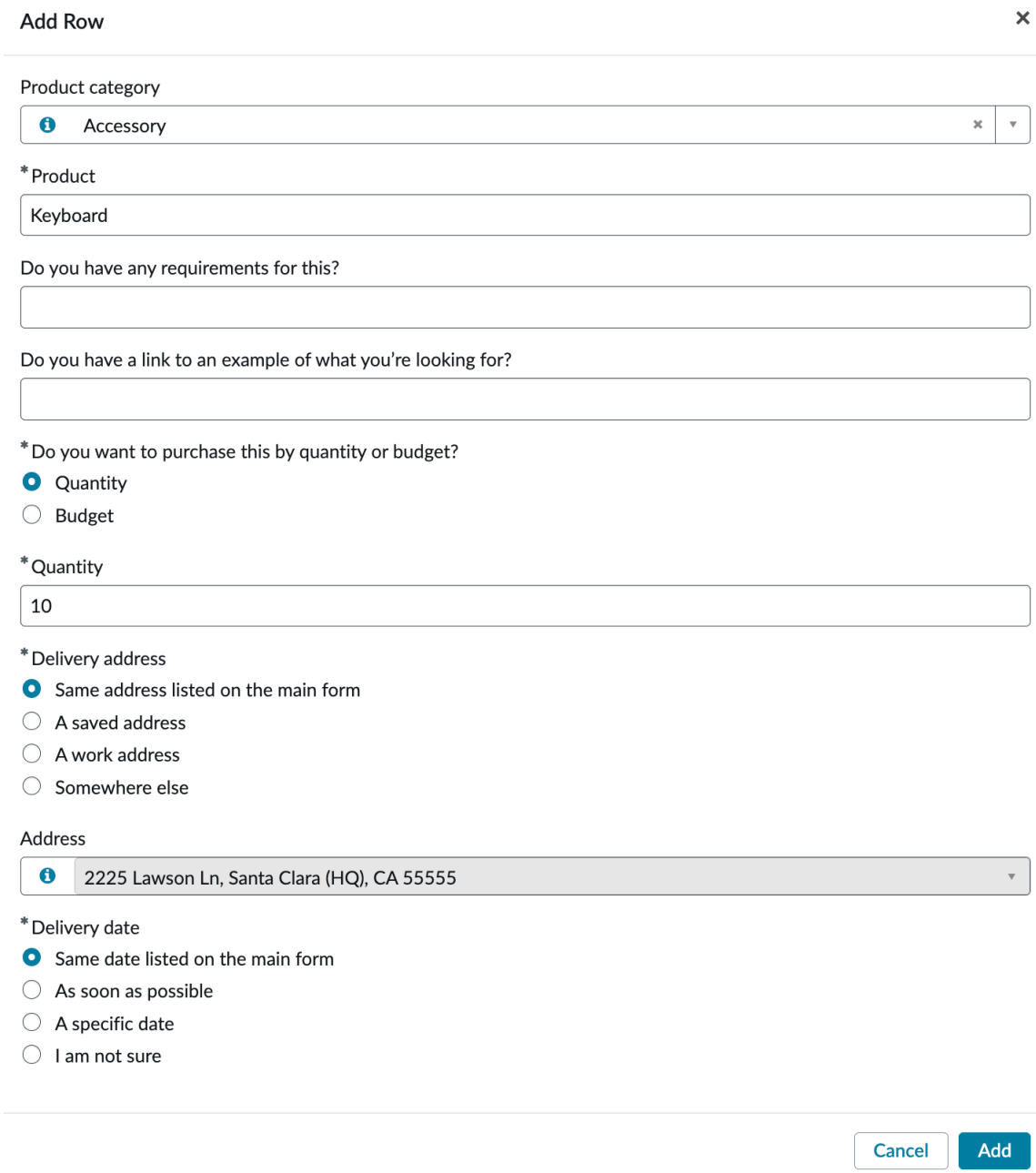
6. Select your delivery address and delivery date.



7. Under **Products** section, select **Add**.
You can add up to 50 different products in a single request.

8. For each product, enter the product name, quantity or budget, delivery address, and delivery date.

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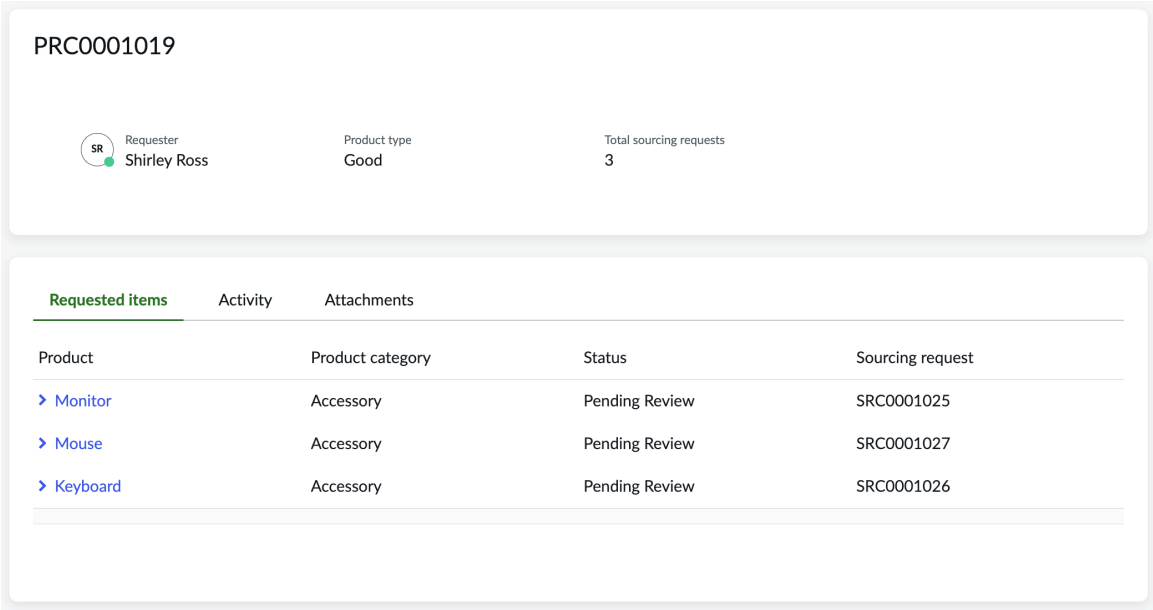
9. Enter the reason why you need these products.

*Why do you need these products ?

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10. Select **Submit**.



Result

Multiple sourcing requests are created and linked to the same purchase record. All related requests are visible and manageable in the Source-to-Pay Workspace, and each sourcing request has its own sourcing event and RFQ identifier.

Manage third-party RFx tasks in Employee Center

Requesters can view and manage third-party Request for anything (RFx) tasks in the Employee Center and navigate to the third-party sourcing tool to review, publish, and award RFx.

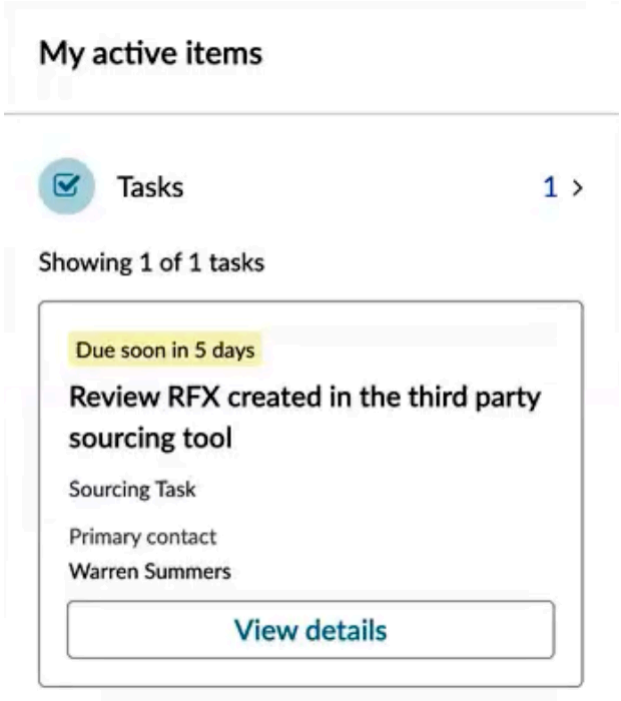
Before you begin

Role required: sn_shop.shopper

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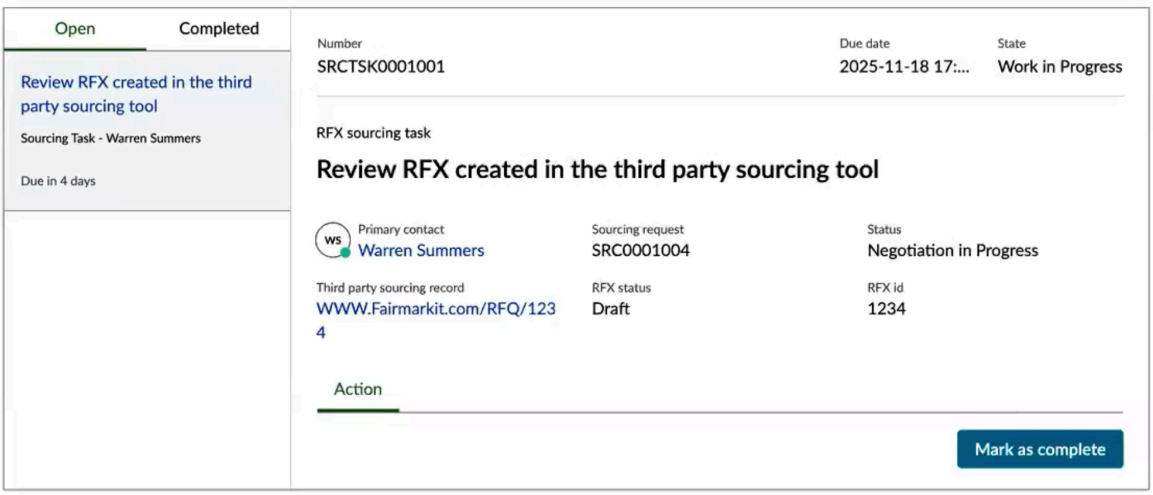
Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.



   RFx tasks appear on the home page and display their closure deadline.

2. Select **View details** on any RFx task to review:
   My tasks



   - Sourcing request
   - Status
   - RFx URL
   - RFx status
   - RFx ID

3. Select the RFx URL to navigate to the third-party sourcing tool.

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Result
You're redirected to the third-party sourcing tool to complete required actions, such as reviewing, publishing, or awarding RFx. The task closes automatically when the event is completed, or can be closed manually.

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.

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.

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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, see Third-party Risk Management.

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 Conduct a Supplier Tiering Assessment case

A new Conduct a Supplier Tiering Assessment case can be created in either of these methods, and assigned to the manager of the GRC group:

- Automatically, triggered based on its requirement specified in the **Tiering assessment needed?** field in the Supplier table. If the risk rating of the related supplier is critical, high, or empty, a Conduct a Supplier Tiering Assessment case is auto-triggered.

  Note: This is unique to the 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

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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:

- 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

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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.

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.

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Impact of demand and project lifecycle on Sourcing and Procurement Operations flows

When a demand is converted to a project as part of demand and project lifecycle:

- The demand number isn't available for selection during checkout.
- When a purchase request line using that demand number is converted to a purchase order line, the latter references the project and not the demand number.
- The cost plan references the newly created project and not the one initially selected by the shopper.
- When an invoice is created, the associated expense line references the project and not the demand number.

When a demand or project is in a closed state:

- The demand or project number isn't available for selection during checkout.
- Cost plans and expense lines aren't created for closed demands and projects. However, if a cost plan is already created for a closed demand or project, expense lines continue to be auto-generated until all the invoices are paid out.

Impact on sourcing request

When requesting pricing for a product that doesn't have pricing available, you must answer the additional question **Is this a purchase for an existing project?**. If your answer is in the affirmative, you must select your project from the list to proceed with submitting the request. On successful submission, the project and demand details are displayed on the sourcing request record.

As a shopper, you can compare the pricing for your purchase, select a supplier, and proceed to checkout.

Impact on off-catalog purchase request

When requesting a quote for a product that is not available on the ShoppingHub catalog, you must answer the additional question **Is this a purchase for an existing project?**. If your answer is in the affirmative, you must select your project from the list to proceed with submitting the request.

Email notifications

When a purchase order associated to a demand or project is created, updated, or canceled, the assigned demand manager or project manager gets an email notification about its impacts on the cost plans of the demand or project.

Sourcing and Procurement Operations integration with Celonis

Identify inefficiencies in your customer business process, understand their business impact, and gain insights into the root causes, by integrating Sourcing and Procurement Operations with Celonis.

Some insights provided by Celonis are listed here:

- Inconsistent payment terms - The payment terms agreed with the supplier is Net 45 on the supplier primary record. However, invoices have an earlier payment term like Net 15 or Net 30. Such inconsistent payment terms, if not recognized, may lead to inefficient usage of working capital. The days payable outstanding of the customer may get reduced.

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- Duplicate suppliers - 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. Some invoices get 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 suppliers.
- Duplicate invoices - The same supplier invoice gets recorded twice. This could be because it was entered once based on the emailed invoice. Later, another payables specialist reentered it when the physical copy was received from the inward mail department. Such invoices, if not identified, may result in overbooking and double payment to the supplier.
- Invoices for late payment risk - 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 invoice has to be released so that the payment can be made on time.
- Supplier bank account missing - 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. They affect inefficient usage of money, overspending, or supplier relationships. With this integration, Celonis insights are easily consumed by the Now platform's intuitive low-code workflow. This creates playbook experiences that guide users through the processes to resolve these issues.

Workflow and playbook experience for Celonis integration

Workflows for the various insights provided by Celonis are built with the help of the Playbooks component provided by the Now platform. For more information on this component, see Process Automation Designer.

Here's an example of an inconsistent payment term insight provided by Celonis, and an end-to-end system built to automate the work for the users.

Create a flow in Playbooks:

- Ingest the data from the Celonis API, create a procurement case, and assign it to a user or group. These cases are displayed in the assigned user's Source-to-Pay Workspace landing page.
- Customers can configure various options like updating the ERP directly from the case playbook, or manually logging in to the ERP to update the data.
- Customers can configure the closure steps. For example, send an email to the supplier with the information that the payment terms have been updated to the original agreed term. 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.

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- 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. This ensures that all the work can be done from the playbook itself without logging in to any other ERP system.

For more information, see Playbook Experience.

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 there, 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 needed. You can then assign it 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.

Sourcing and Procurement Operations integration with Field Service Management

The Procurement for Field Service Management plugin (sn_fsm_psm_mobile) provides an integration between the Field Service Management and Sourcing and Procurement Operations applications.

A field service agent working on completing a particular work order task could view the asset inventory, locate the parts that are available in stockrooms in real time, and source them as per requirement. With this integration, a field service agent can engage with procurement and place an order to purchase a required part from a vendor or supplier.

This functionality is available only on your mobile device through the Agent mobile application.

Note: This integration application is owned by the Field Service Management team. To use this application, a license is required for both Field Service Management and Sourcing and Procurement Operations.

Changes to the Field Service Management application

In the Field Service Management application, this integration adds a Purchase Orders related list to the part requirement form on your mobile device. This list shows the order details of the purchase made with a vendor or supplier.

Also, the **Order Part** button has been added, which enables a field service agent to purchase the part if it is not available in the inventory or any physical stockroom.

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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 (sn_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**.

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.

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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.

Source-to-Pay Operations integration with Contract Management Pro

The Source-to-Pay Operations with Contract Management Pro plugin (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
- Sourcing events

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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

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Source-to-Pay Operations with Contract Management Pro plugin (sn_spend_clm).

   Note: To activate this plugin, there is a dependency on the Sourcing and Purchasing Automation plugin (sn_pr) and the Microsoft Word add-in for ServiceNow Contracts plugin (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 into your workspace.

Initiate a contract request

Initiate a contract request from the Source-to-Pay workspace.

Before you begin

Role required: sn_cm_core.contract_user

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 templates for a contract requests. 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.

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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 sourcing 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 sourcing 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.

Initiate a contract request from the related work section

Initiate a contract request for purchase lines, purchase requisitions, sourcing requests, negotiations, or sourcing events from the related work section.

Before you begin

Role required: sn_cm_core.contract_user

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 sourcing 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: sn_cm_core.contract_user

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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 sourcing 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: Sourcing events and sourcing requests can be associated with multiple suppliers. Therefore, you must select a supplier to create a contract request for sourcing events and sourcing requests.

7. Select **Initiate**.

Initiate a contract request from the playbook

Initiate a contract request for sourcing requests or sourcing event from the playbook.

Before you begin

Role required: sn_cm_core.contract_user

Procedure

1. Navigate to the **Source-to-Pay Workspace**.
2. Open the sourcing request or sourcing event for which you have to initiate a contract request.

   Note: From the playbook, you can initiate contract requests for sourcing requests and sourcing 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**.

Using Now Assist for Contract Management in Sourcing and Procurement Operations

With the sn_cm_gen_ai.ai_contract_fulfiller role, you can review non-standard or missing clauses in procurement contracts and extract key details to update the contract repository using Now Assist for Contract Management within the Source-to-Pay Workspace.

Enable Now Assist in Contract Management

Install the Now Assist in Contract Management plugin (sn_cm_gen_ai) and activate the generative AI skills to use Now Assist skills in Contract Management.

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About this task

Use the Now Assist console to enable Now Assist in Contract Management. This console contains everything that you need to install the plugin and activate the generative AI skills. For additional information, see Overview tab in AI Admin Hub.

The following skills are available for Contract Management in the AI Admin Hub console.

- Contract metadata extraction
- Contract analysis

Before you begin

Role required: sn_cm_gen_ai.ai_contract_admin

Procedure

1. Install the Now Assist in Contract Management plugin (sn_cm_gen_ai).

   For information about the plugin installation process, see Install plugins for ServiceNow Otto.

2. Navigate to **All** > **Now Assist Admin** > **Features** to open the **Now Assist Features** tab on the AI Admin Hub console.
3. Navigate to **Employee** > **CM Pro**.
4. On the feature card that contains the skill that you want to activate, select **View details**.
5. In the **All available Contract Management Pro skills** section, select **Turn on** for the skill that you want to activate.

Start a metadata extraction for a contract from Source-to-Pay Workspace

Extract metadata from a signed contract attached in a contract repository record.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

By default, the following use cases are available for Sourcing and Procurement Operations, which are mapped to the purchase requisition, purchase line item, and negotiation tables.

- CM Pro - Contract Analysis
- CM Pro - Contract Metadata Extraction

For more information, see Extract contract metadata.

Procedure

1. Open the **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **My work** > **Open contract requests**
3. Select a contract request that is in Closed complete or Contract signed state.
4. Select **Initiate metadata extraction**.
   A message appears stating that the metadata extraction process has been initiated. You receive an email notification when the process is completed.

   The **Review extracted metadata** button appears on initiating the metadata extraction. You can select the button after the metadata extraction is completed.

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What to do next

Review the metadata extracted from a contract and add it to the contract repository. For more information, see Work with extracted metadata.

The Extraction results tab in the contract repository record displays the processed metadata and their statuses, indicating whether the metadata have been successfully added to the mapped fields in the contract repository. For more information, see Metadata extraction results.

Analyze a contract document from Source-to-Pay Workspace

As a contract fulfiller, analyze a contract document with generative AI to identify non-standard and missing clauses.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller or sn_cm_core.contract_fulfiller

About this task

You can analyze an entire document and identify any non-standard or missing clauses by using generative AI with the Now Assist in Contract Management application. With generative AI, your organization can save time and effort by reducing the need for manual review.

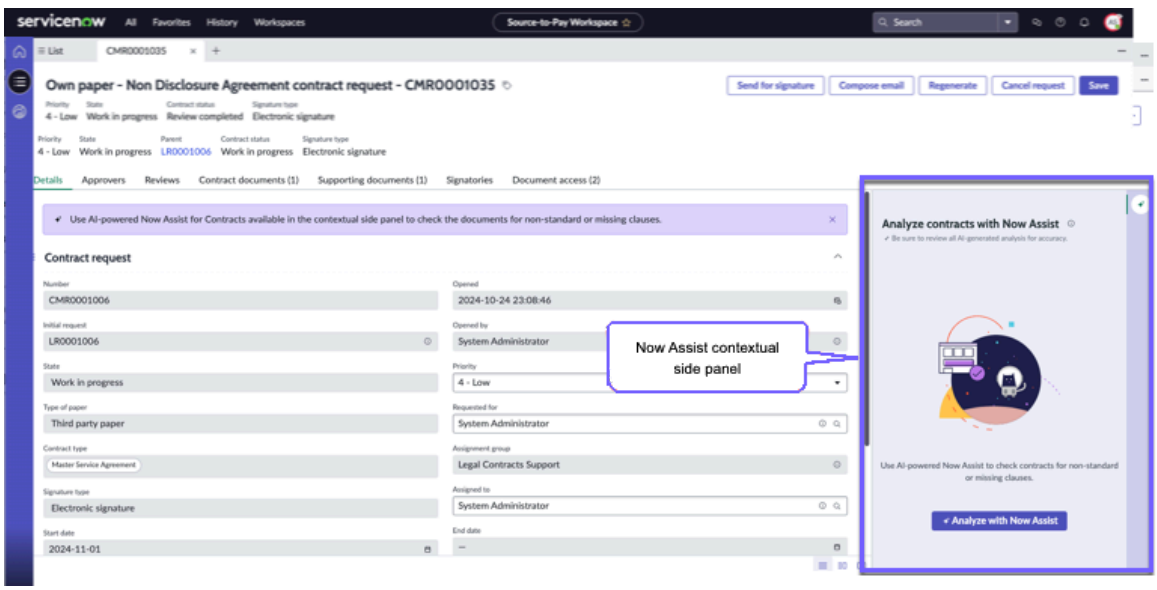
For more information, see Contract review using ServiceNow Otto for Contract Management Pro.

Procedure

1. Open the **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **My work** > **Open contract requests**
3. Select a contract request that is in Work in progress state.

   Note: You can analyze only the contracts that are in Work in progress state.

4. If the contextual side panel isn't open, select the Now Assist Contract Review by Now Assist icon ( ).
   You can analyze contracts in the Now Assist contextual side panel as shown in the following example.



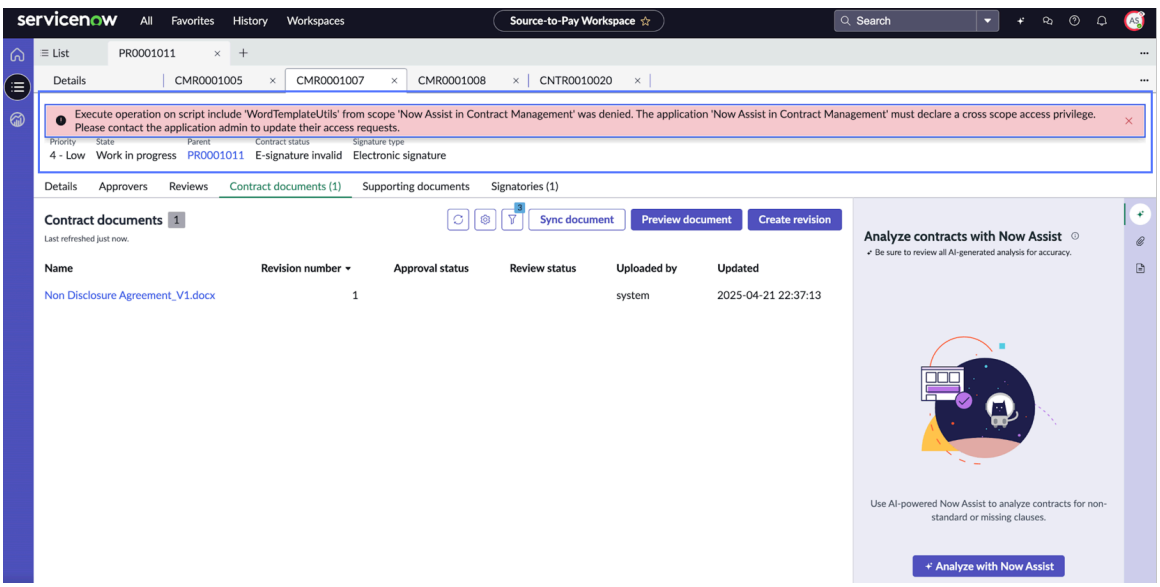
5. On the contract request page, select **Contract documents**.

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6. Submit contract documents for Now Assist analysis.
   The latest versions of the documents are automatically selected for analysis.

Method	Steps
Run Now Assist analysis on a single contract document	**a.** On the **Contract documents** tab, select a contract document. **b.** From the contextual side panel, select **Analyze with Now Assist**.
Run Now Assist analysis on multiple contract documents	**a.** After opening a contract request, from the contextual side panel select **Analyze with Now Assist**. **Note:** A list of contract documents that were submitted for the Now Assist analysis is displayed. Information about the documents and any errors that were found are also included. **b.** Select **Analyze contract**.

After you select **Analyze with Now Assist**, you might encounter Restricted Caller Access (RCA) approval messages as shown in the image.



For more information about approving restricted caller access (RCA) privileges to allow cross-scope access to Now Assist in Contract Management, see RCA approvals for Now Assist in Contract Management.

7. Select **Analyze contract**.
   a. The Now Assist application creates a copy of the documents and starts analysis on the new documents. The status is now Analysis in progress.
   b. A card is created for each document in Analyzed contracts with the Now Assist contextual panel. The contract status updates to the Awaiting review status.
   c. When the analysis of the documents is complete, the status changes to Ready for review with the following details:

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Status of action taken on the contract analysis suggestions

Section	Description
Pending reviews	Displays the number of deviations reported and pending for review.
Completed	Displays the number of reviewed deviations that have been reviewed and any actions taken.

8. Select the document card to view the details of the analysis.
   The details of the contract analysis are displayed with the Now Assist comments. The comments explain the reasons for marking a clause non-standard.
9. View the analysis and select **Back** to go to the analyzed contracts in the Now Assist contextual side panel.
   You can only view the suggestions in the contextual side panel. To act on a suggestion, open a .docx Microsoft Word document and use the Microsoft Word add-in for ServiceNow Contracts. For more information, see Contract analysis states

RCA approvals for Now Assist in Contract Management

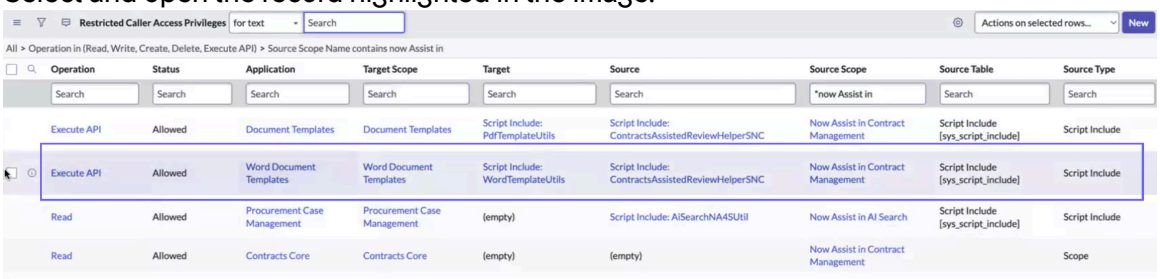
Approve restricted caller access (RCA) privileges to allow cross-scope access to Now Assist in Contract Management.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. In the search field of the Source Scope column, enter `Now Assist in Contract Management`.
3. Select and open the record highlighted in the image.



4. Set the **Status** field to **Allowed**.
5. Select **Update**.

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

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correct attributes for Sourcing and Procurement Operations objects, and to support multi-ERP integration, these updates are enabled.

Fx currency and conversion rates

Conversion rates from the Finance Exchange Rates (sn_fin_fx_rate) table are used. This table has an ERP Source column, and records like purchase requisition and purchase order are also tied to the ERP Source column. By taking the legal entity and getting an ERP source from the legal entity, the right conversion rate is derived.

Fx2 currency amount is converted into your legal entity local currency amount and legal entity reporting currency amount by using the conversion rate from the Finance Exchange Rates table. All these converted values are stored in the PSM FX Currencies (sn_shop_fx_currency_instance) table.

Shopping Hub

Foreign currency transactions are supported. A foreign currency transaction is one where the contract currency, also known as the transaction currency, is different from the local currency of the legal entity. For example, if an employee whose legal entity has a local currency of USD, purchases something which is in the contract currency of EUR, then it becomes a foreign currency transaction. In such cases,the contract amount is converted into the legal entity local currency in the shopping cart by using the exchange rate from the Finance Exchange Rates (sn_fin_fx_rate) table, where the ERP source in the Finance Exchange Rates table matches with the ERP source or legal entity of the employee.

Also, purchase requisitions are split based on currency of the purchase requisition lines. Legal entity local currency is used to do the conversions during checkout.

Cost center and GL account

Cost center and GL account values are restricted by the ERP source on the object. The legal entity from the object is considered, and the ERP source is fetched. When a user updates the record, only those cost centers that have matching ERP sources are displayed in the Source-to-Pay Workspace.

Note: These validations are enforced only when a legal entity has been set up for integration with ERPs. If you've set up integration with an ERP, then you'll see the data having the same ERP source, thereby preventing downstream errors during integration.

If there's any record with different ERP sources, then an integration error task is raised. This is an indicator for your fulfiller to correct the record before processing it further.

SpendInt APIs

SpendInt APIs allow external procurement systems to send catalog, pricing, order, shipment, and invoice data to ServiceNow, synchronizing procurement data from third-party systems.

The Source-to-Pay Integration Framework provides the SpendInt API in the *sn_spend_intg* namespace. The API supports data-level, asynchronous integrations where external systems send updates to ServiceNow after the source system changes data.

Purpose and usage

SpendInt APIs are appropriate when procurement data is created or managed outside ServiceNow and must be pushed into ServiceNow to support purchasing, fulfillment, and financial workflows.

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Supported data scenarios

A dedicated SpendInt endpoint under the `/api/sn_spend_intg/spendint` path handles each inbound procurement scenario.

SpendInt API endpoints

Data scenario	Purpose	SpendInt API
Catalog ingestion	Create or update supplier products, product models, categories, and related attributes	`POST /sn_spend_intg/spendint/catalog`
Price updates	Update pricing for existing supplier product records	`POST /sn_spend_intg/spendint/price`
Availability updates	Update product availability or stock information	`POST /sn_spend_intg/spendint/availability`
Order acknowledgements	Send order confirmation details after a purchase is submitted	`POST /sn_spend_intg/spendint/orderack`
Shipment updates	Send shipping and delivery status for orders	`POST /sn_spend_intg/spendint/shipment`
Invoice ingestion	Send invoice data generated in external systems into ServiceNow	`POST /sn_spend_intg/spendint/invoice`

For details about individual APIs, request payloads, and field mappings, see the SpendInt API reference documentation.

Data processing

SpendInt endpoints receive inbound payloads and write them to integration staging tables managed by the Source-to-Pay Integration Framework. The framework then validates and transforms the data into the appropriate procurement records, such as products, orders, shipments, or invoices.

This design separates data ingestion from record creation, allowing consistent handling of supplier data across integration scenarios.

Model matching during catalog ingestion

During catalog ingestion, the framework determines a supplier product's model through two paths. By default, the framework uses manufacturer part number matching. When a Software Product Definition is found, SAM Pro uses that definition instead.

Hardware Asset Management (HAM), Enterprise Asset Management (EAM), Software Asset Management (SAM) without Pro, and SAM Pro when no Software Product Definition is found

- The system searches for a model using the manufacturer part number and manufacturer.
- If found, the model is assigned to the supplier product. Otherwise, a new model is created.
- If the manufacturer part number is empty, the supplier part number is used as the model number.
- Supplier part number is mandatory and determines whether the supplier product is created or updated.

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SAM Pro when Software Product Definition is found

- The manufacturer part number is matched to the publisher part number on the Software Product Definition.
- SAM Pro uses that definition to find or create the canonical software model.
- The imported manufacturer is not used in this path.
- The canonical model is assigned to the supplier product.

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.

Third-party **registration for PIF and PFTF integrations**

Third-party registration enables you to configure supplier integrations for Source-to-Pay Integration Framework (PIF) and Procurement File Transfer Framework (PFTF).

Navigate to **All** > **Procurement Integrations** > **Setup** > **Third-Party Registration**. For third-party registration, following are the fields:

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Third-Party Registration form

Field	Description
Provider name	Unique identifier for the supplier.
Supplier	Name of the supplier in the ServiceNow records.
Customer id	Unique identifier for the customer.
Import catalog	Supplier is allowed to import catalog, which includes price and availability.
Post order	Supplier is allowed to post orders.
Import invoice	Supplier is allowed to import invoices.
Allow purchase order revision	Supplier allows purchase orders to be revised after confirmation.
Import shipment	Supplier is allowed to import shipments.
Allow multi location order	Supplier allows orders to be split for multi-location shipping.

Import data using FTP server

Import a file from a local source, a remote network server, or another instance by providing a path and authentication information. Transfer and manage procurement data in a principled structure that administrators can use for various data management operations.

Before you begin

- Understand the data import workflows and FTP functionality.
- Ensure that you install and configure an FTP client.
- Ensure that you install and configure MID Server in your ServiceNow instance to connect to the ERP server. See Installing the MID Server for details.

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

- Ensure you have permissions to access and pull data from FTP.

Role required: import_admin or admin

Procedure

1. Navigate to **All**.
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:

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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.

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.

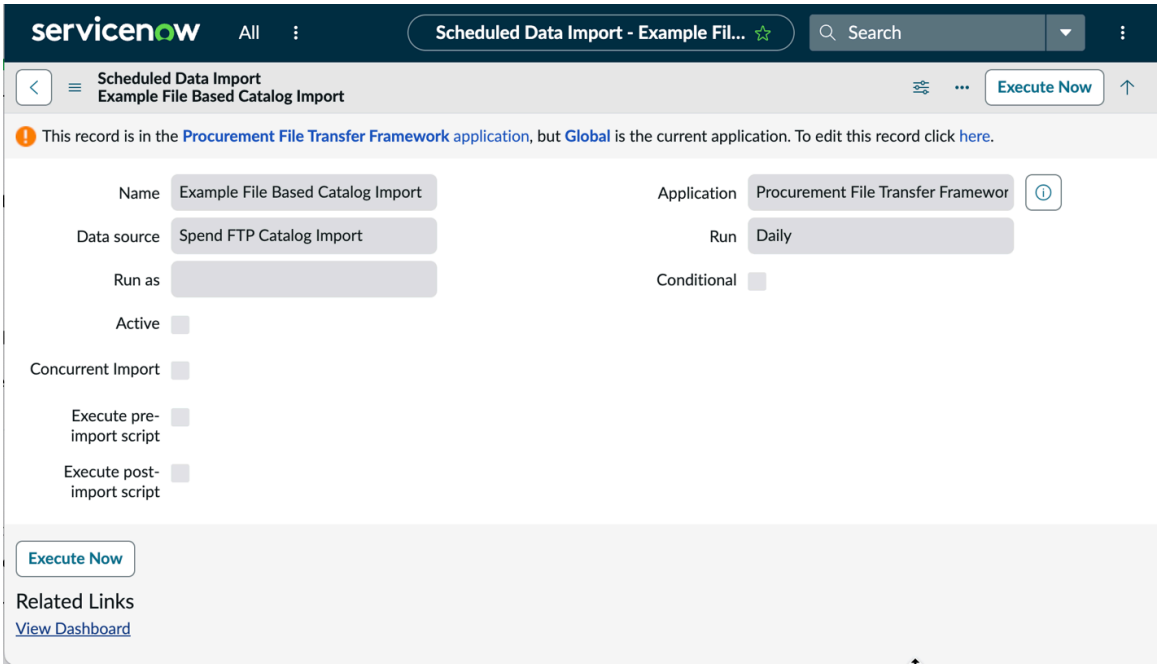
Before you begin

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**

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3. Follow the steps for data import.

What to do next

- You can verify the data transfer records from **Procurement Integrations** > **Catalog** > **FTP Catalog Imports**. You can see all the data as one single payload content. See Payloads for more information.
- The same record is then transformed and available from **Procurement Integrations** > **Catalog** > **Catalog Imports**.

Perform export steps

Export a file from a local source, a remote network server, or another instance by providing a path and authentication information.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Procurement Integrations** > **File Transfer Setup** > **FTP Integration Configurations**.
2. Select **New**.
3. Select one of the following operations:
   - Post Purchase Order
   - Post Catalog Error
   - Post Shipment Error
   - Post Invoice Error
   - Post Price Error
   - Post Availability Error
4. Provide **Mid server** connection and path details.

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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.

Data sources

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
```

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Associated Table Transform Map

To import data, define a data source and transform map, and schedule or run an import at some regular interval.

Table transform map is associated with the table to transform the `File Based Catalog Import [sn_spend_ftp_intg_catalog_stage]` data into `Catalog Import [sn_spend_intg_imp_catalog]`. See the following table transform labels and associated table information.

Associated table transform map

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.

Payload details

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)

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```
{
  "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",
        "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": {
```


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```
    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
      {
        "supplier_shipment_number": "SHIPSUP00001 \n",
        "sales_order_number": "SOL0010001 \n",
        "sales_order_line_number": "SOL0010001 \n",
        "error_message": "The purchase order for this shipment
 does not exist \n"
      }
    ]
  }
}
```


Invoice Error (Outbound)


```
{
  "root": {
    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
      {
        "supplier_invoice_number": "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",
```


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```
        "contract_number": "VEN09000002 \n",
        "organization_id": "868979 \n",
        "enroll_in_abm": "yes",
        "shipping_address": {
          "name": "2225 Lawson Ln, Santa Clara, CA 95054, United
 States\n",
          "street": "2225 Lawson Ln \n",
          "city": "Santa Clara \n",
          "state": "CA \n",
          "zip_code": "95054 \n",
          "country": "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.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Related topics

Exploring Sourcing and Procurement Operations

Configuring Sourcing and Procurement Operations

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.

This video shows the shopper journey, from searching for products in Employee Center to purchasing in Shopping Hub, fulfillment in Source-to-Pay Workspace, and receipt completion in Shopping Hub.

https://player.vimeo.com/video/1073634788?h=44cc0708f7&badge=0&autopause=0&player_id=0&app_id=58479

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.

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- 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

Setting up primary data for ShoppingHub

Service portal configuration for ShoppingHub

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.

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:

Fields in Work address

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.

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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.
Zip / Postal code	The zip code of the delivery location.

6. Select **Submit for approval**.

Browse punchout and native catalog items from the Categories and Suppliers lists in Shopping Hub (SH)

In Shopping Hub, you can view both the punchout (third-party) and the native catalog items from the Categories or the Suppliers list on the Shopping Hub home page.

Before you begin
Role required: sn_shop.shopper

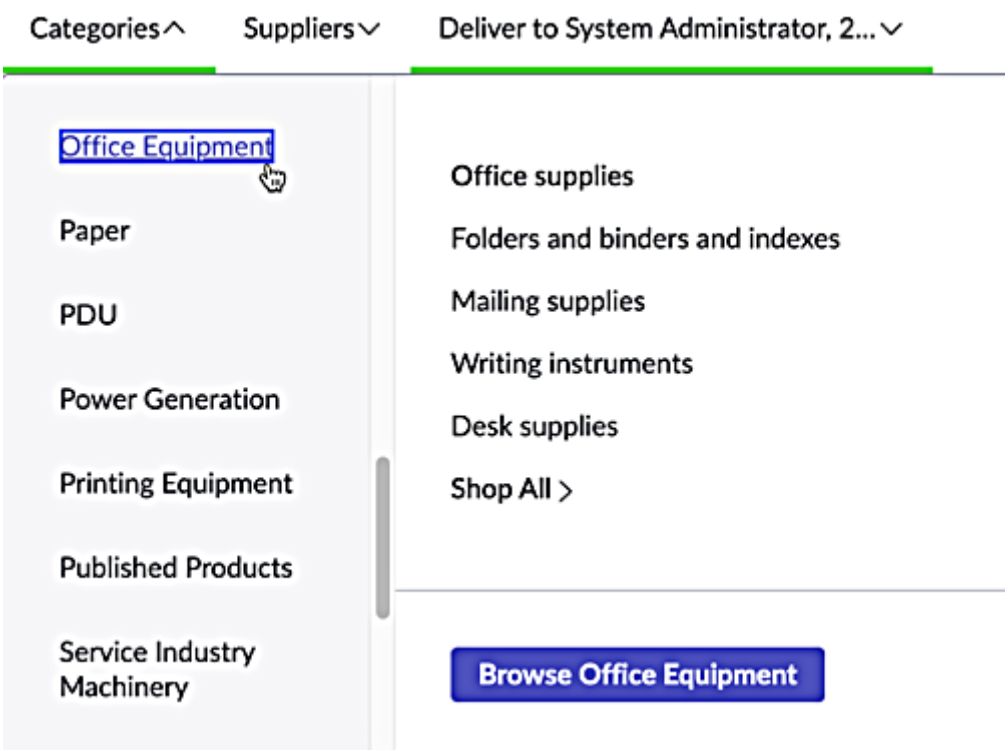
About this task
Only cXML punchout products are displayed in both the **Categories** and **Suppliers** lists. The punchout products uploaded via API are not listed.

Important: Enabling shopping controls may affect the page load time.

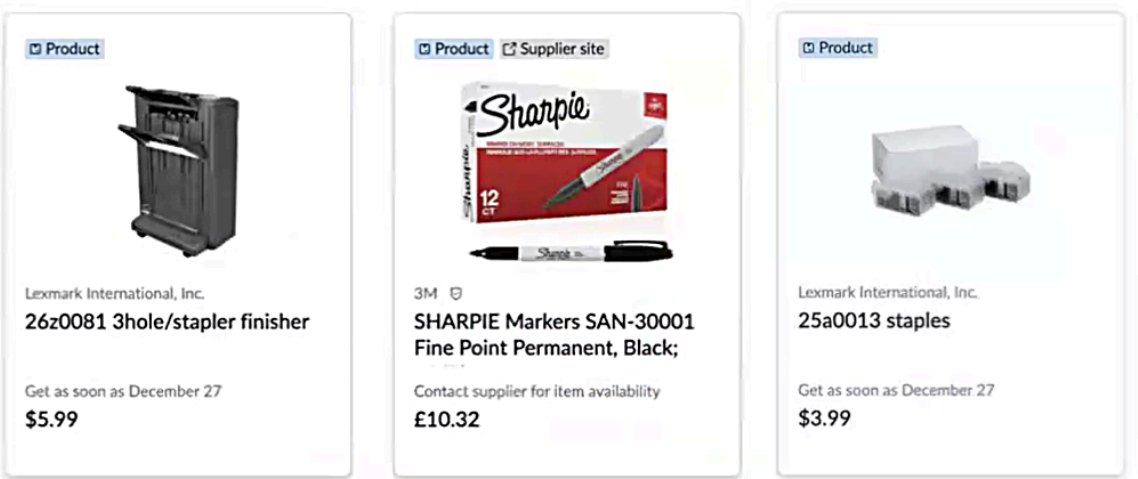
For more information about the checkout experiences for shoppers based on whether they have installed Employee Center, Shopping Hub, or both, see Shopper checkout experiences based on installed applications.

Procedure
1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Select the **Categories** list, and select a category; for example, Office Equipment.
3. Select **Browse Office Equipment**.

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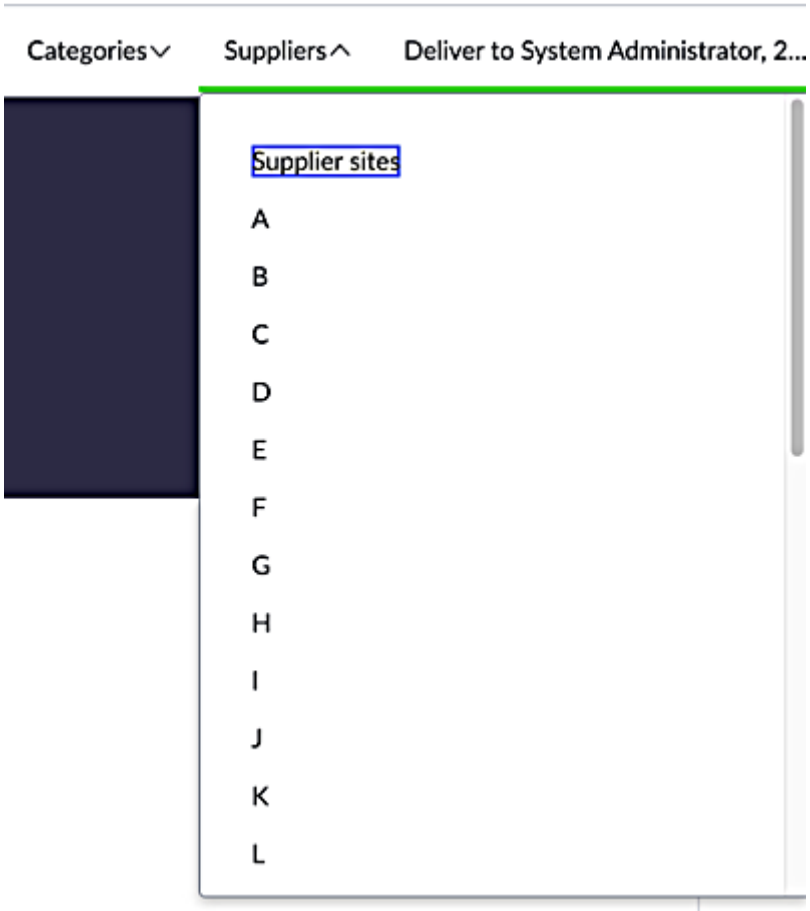


The Office Equipment page displays both the punchout and native catalog items that belong to this category.



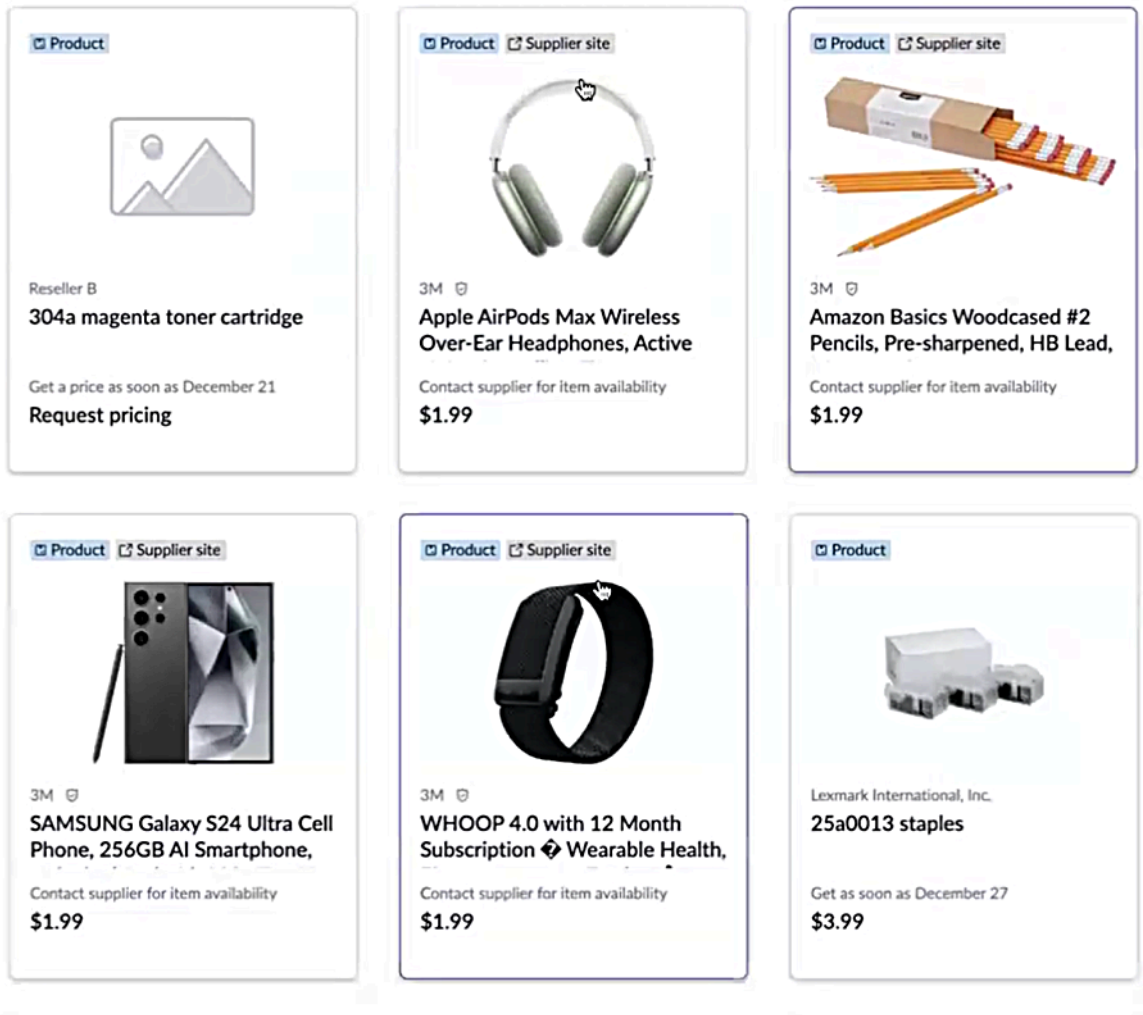
4. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
5. From the Suppliers list, select the letter corresponding to the first letter of the supplier's name.

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6. Select a supplier.
   The supplier page displays both the punchout and native catalog items that are sold by this supplier.

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7. On the product tile you want to purchase, select one of the following options:

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- Select **Product** to open the product page and add it to your cart or request to purchase.
- Select **Supplier site** to open the supplier's website.



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 in one of the following ways: .
   - Search for the item.
   - On the Shopping Hub home page, use the Categories or the Suppliers list.
   - If you're a returning shopper, find your recently viewed items on the home page.

   On the product details page, you can see the price of the product and the probable date of its delivery.

   If the pricing isn't available and you need to contact the supplier for it, you can check the expected date by which the pricing details will likely be provided. For more information, see Complete sourcing checkout.

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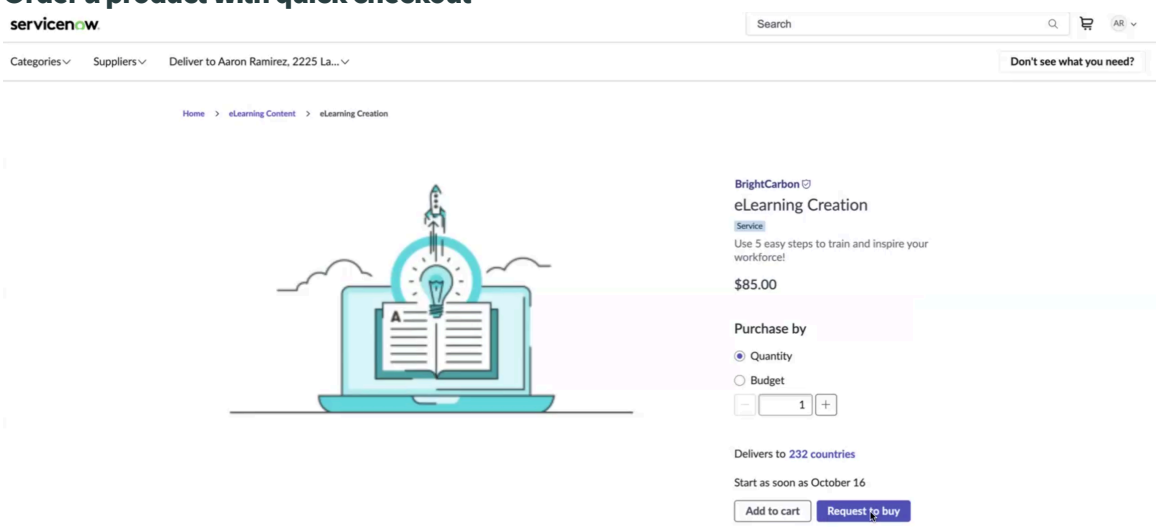
3. Place an order for a product or service that has pricing.
   a. Select **Quantity** or **Budget** as appropriate.
   b. Enter the quantity that you need or the budget at your disposal.

> **Note:**
> - When placing an order for a service, you can enter quantities with up to four decimal places.
> - 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:
   - To perform a quick checkout with your selected product, select **Request to buy**.
   - To save your product to your cart and continue shopping, select **Add to cart**.

> **Note:** For more information on how to use your shopping cart, see Shopping cart.

Order a product with quick checkout



   d. On the form, fill in the fields.

Quick checkout form

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	Date range when you want your product to be delivered. The options are:

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Field	Description
need this product?	▪ 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%. 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.

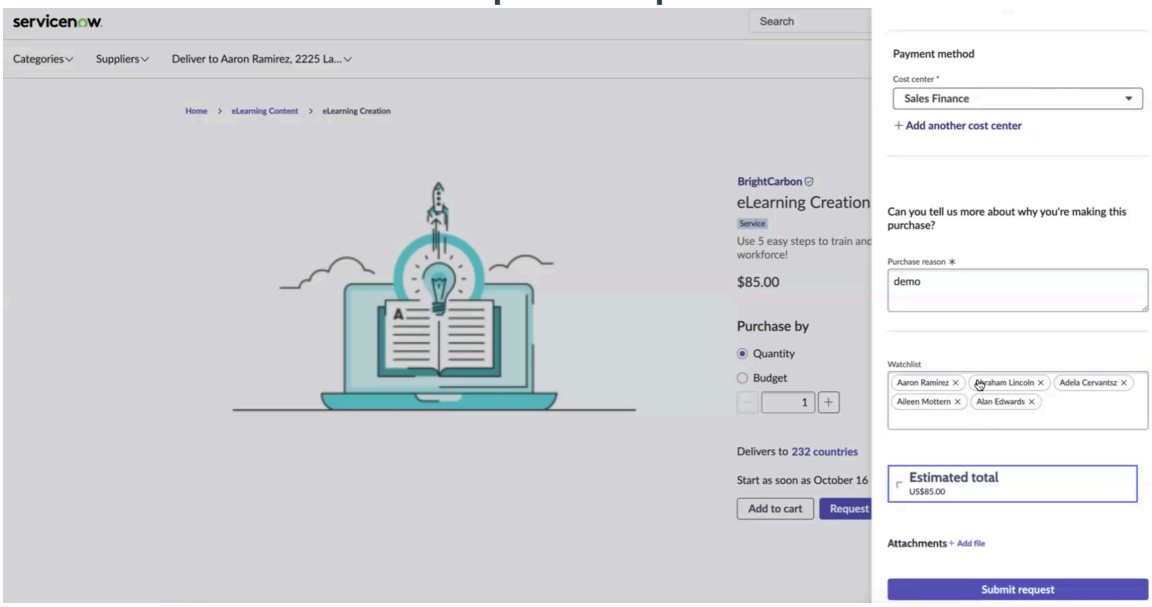
Purchase options

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.

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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.

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.

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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

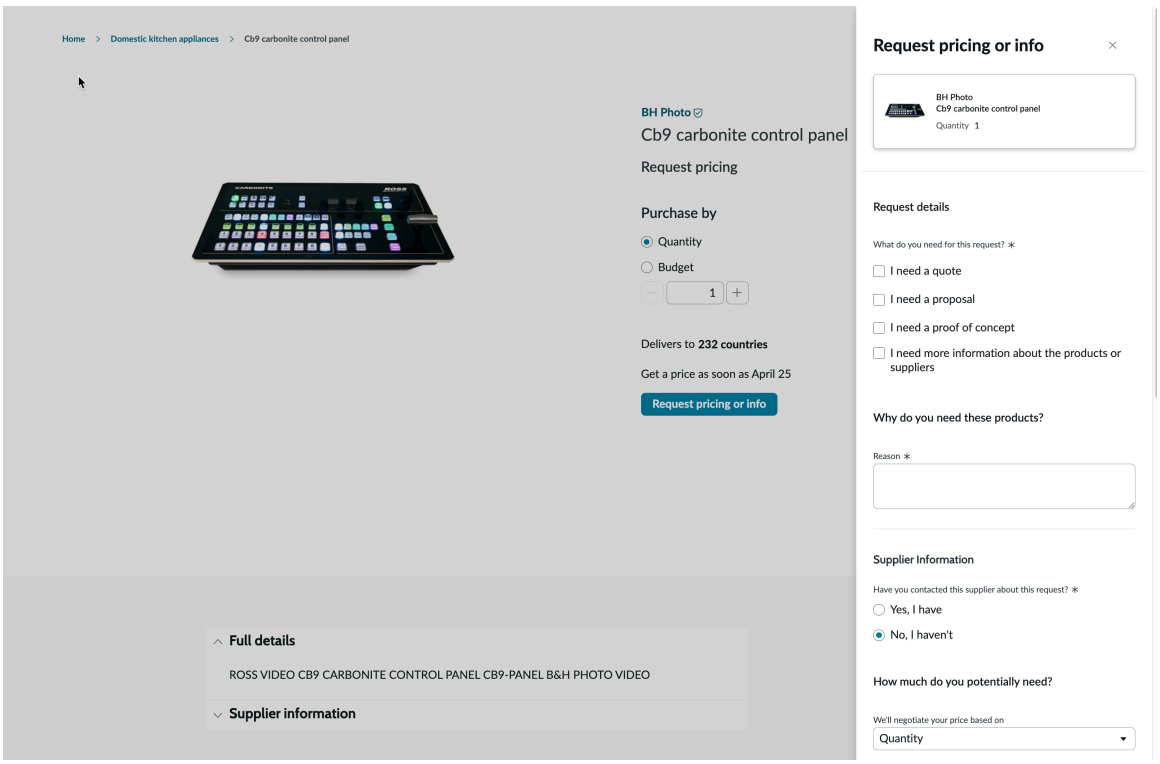
Role required: sn_shop.shopper

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.
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

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- 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.

  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.

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- **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 want to purchase when you are done shopping on Shopping Hub.

Before you begin

Role required: sn_shop.shopper

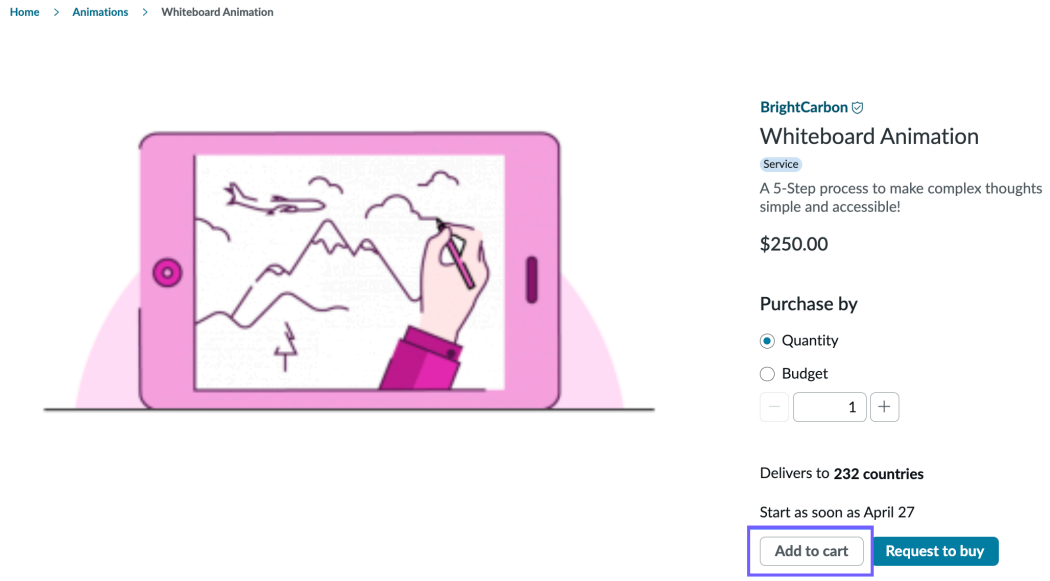
Procedure

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.

   When placing an order for services, you can enter quantities with up to four decimal places. For more information, see Order a product

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3. Select **Add to cart**.



What to do next

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

Review your shopping cart

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

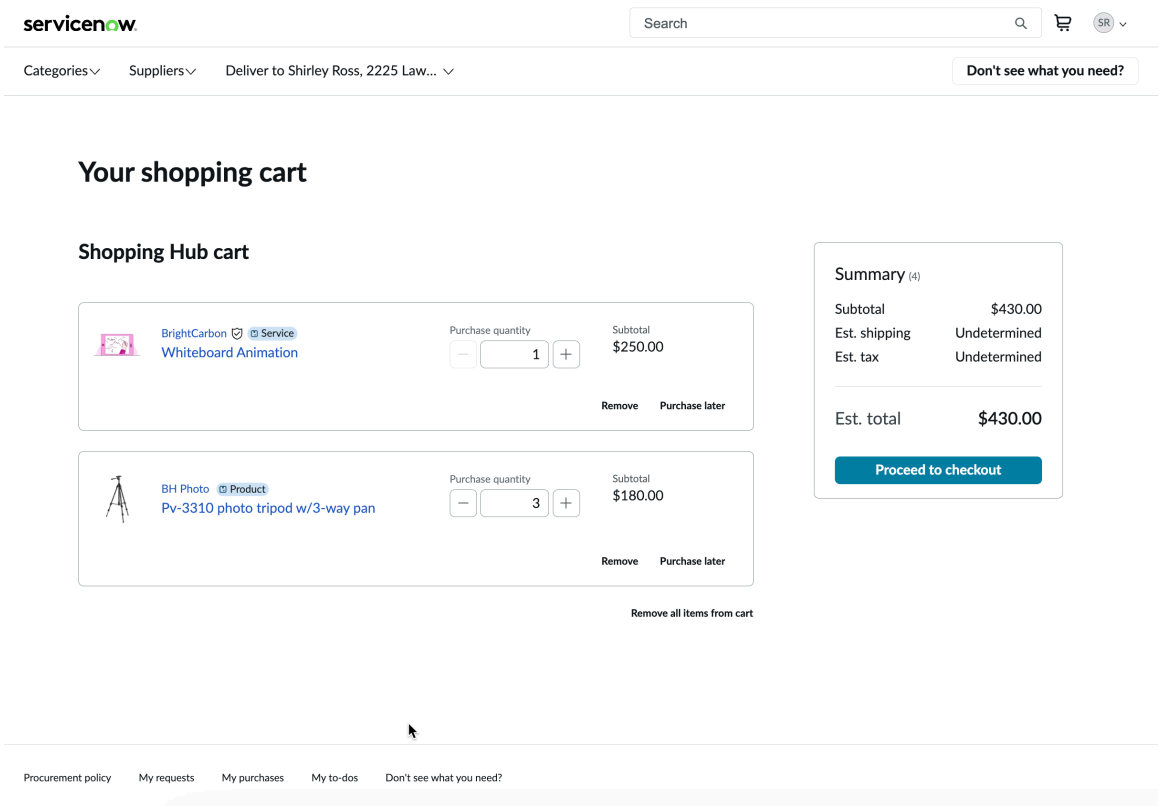
Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Select the shopping cart icon.
3. Do one of the following actions:

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- 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

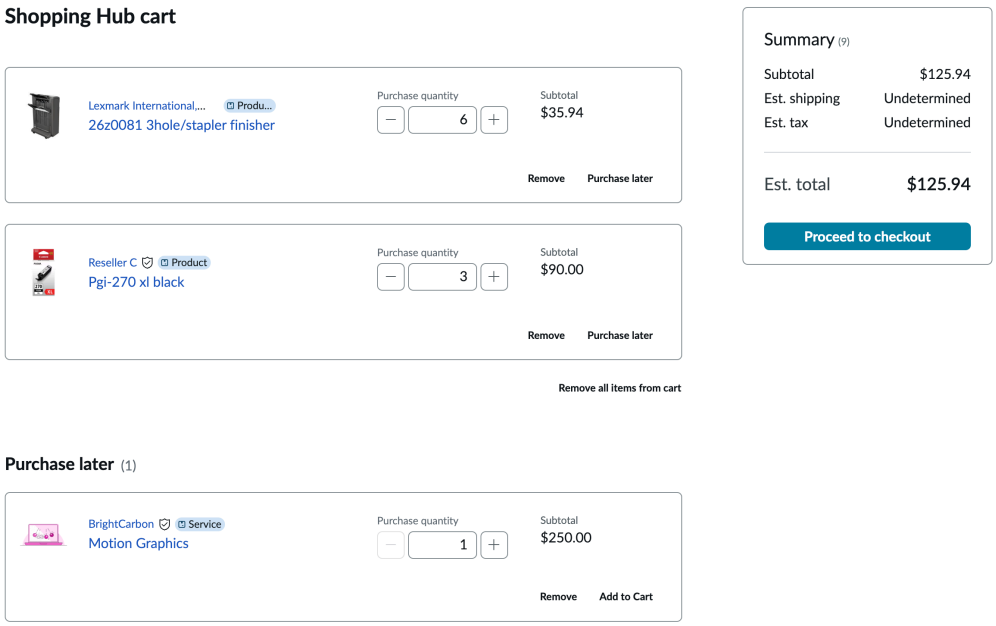
Cart lines are created, updated, or deleted based on the updates that you make to the products in your shopping cart.

- 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.

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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.
- 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.

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Shopping controls

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

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

Complete your checkout

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

Before you begin
Role required: sn_shop.shopper

Procedure

1. Select a delivery location.
2. Select a delivery date.
3. Select a payment method.
4. Provide a reason for your purchase.
5. Add users to the watchlist of the purchase
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:

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- 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

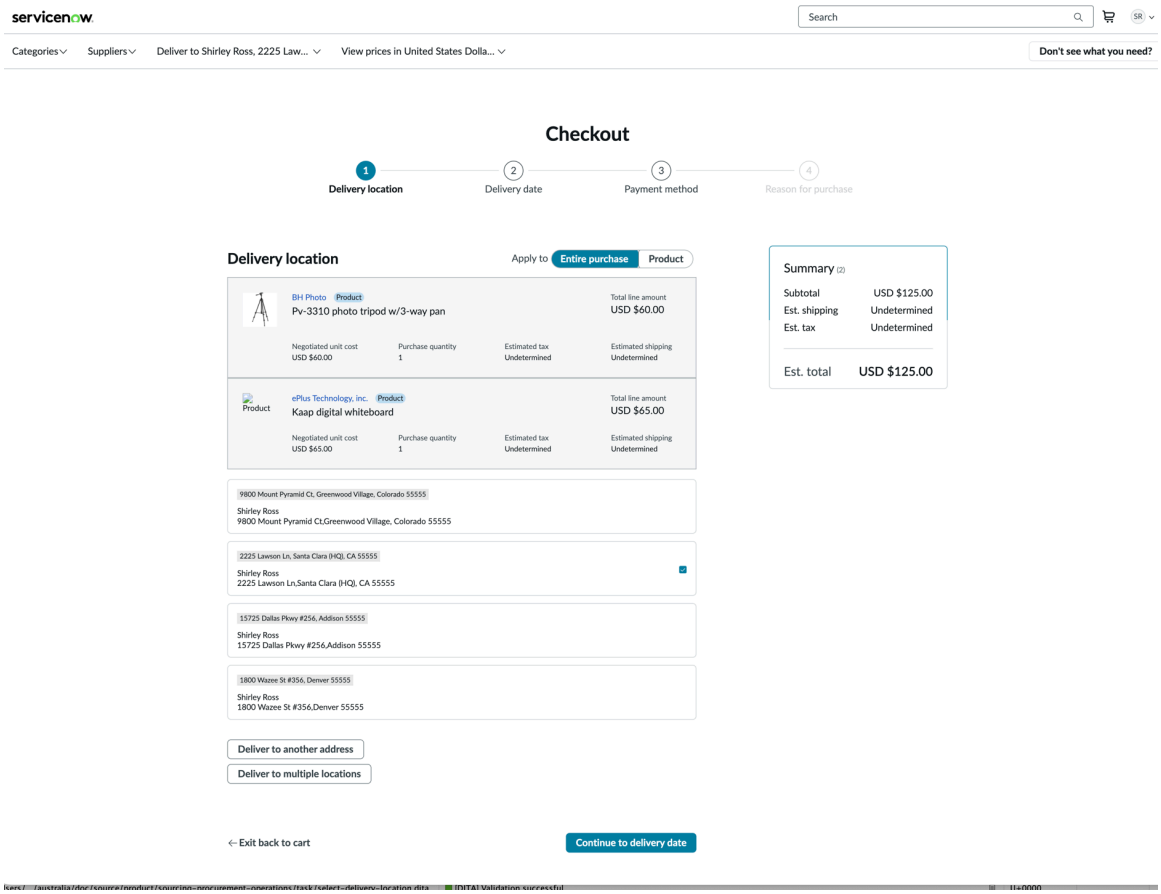
You can select either a single delivery location or multiple delivery locations for the various products in your cart.

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.

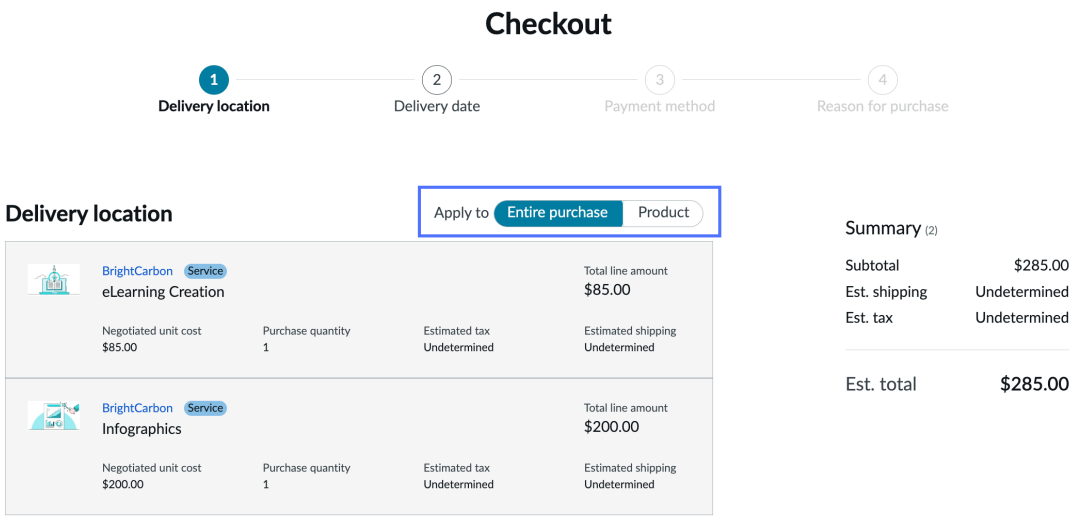
To prevent products from being shipped to invalid locations, see Manage delivery to valid address

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.

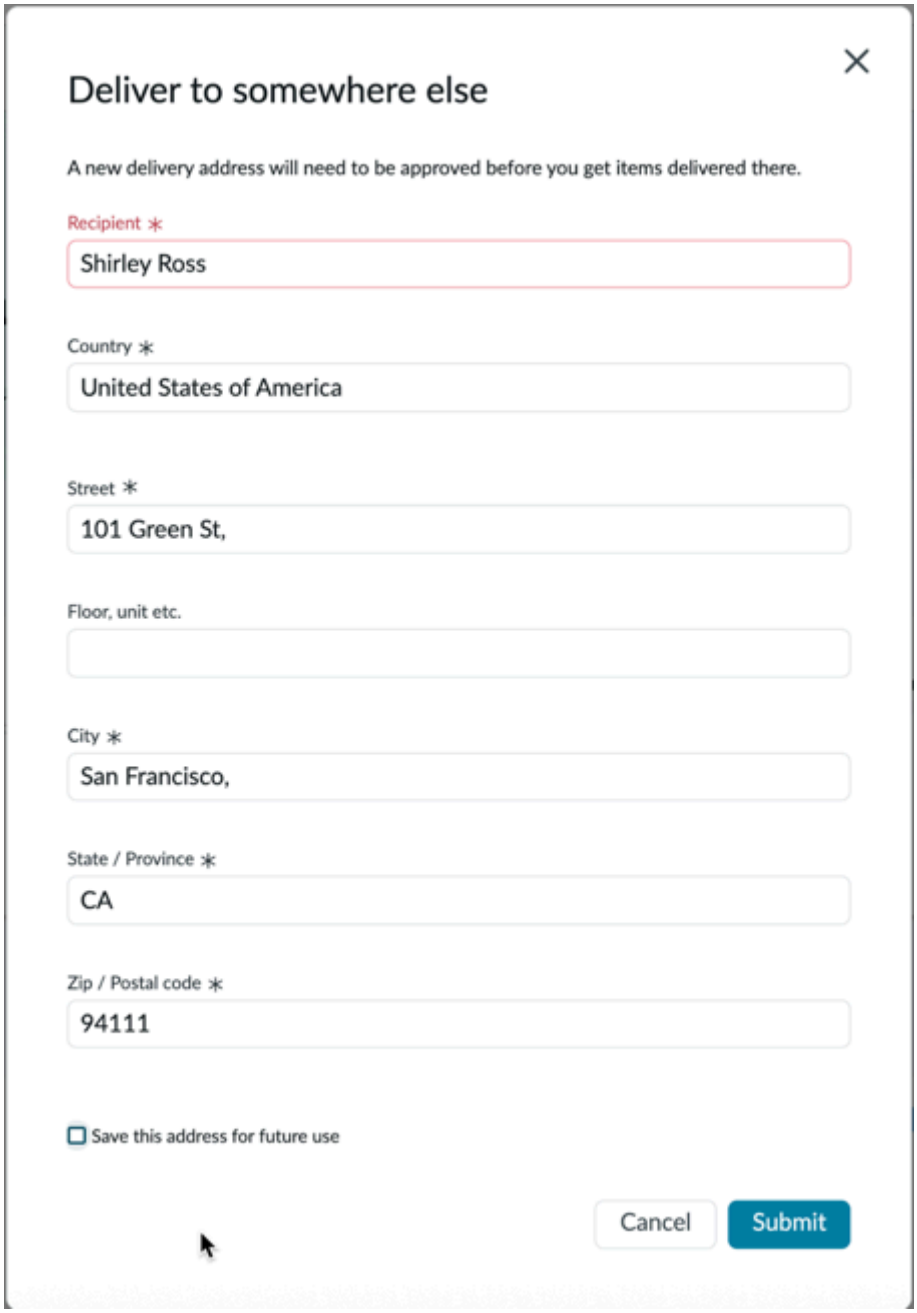
Toggle between entire purchase and product



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:

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- **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

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Delivery address suggestions

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

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

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

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

Valid countries for delivery

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

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

On configuration, shoppers can gain the following insights:

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

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

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

For more information on how to configure valid countries, see Manage delivery to valid address.

Related topics

Valid country location

Valid country location

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

Validate addresses

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

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

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

Address validation flows

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

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

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

Related topics

Manage delivery to valid address

Valid countries for delivery

Delivery location options

Shipping methods

Shipping methods define how goods are transported from suppliers to delivery destinations. Administrators can create shipping methods and associate them with suppliers and delivery locations.

About shipping methods

Shipping methods are applicable only 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.

If a shipping method is defined by the administrator for a specific supplier and a specific delivery location, it displays to the shopper during checkout. When multiple shipping methods are available, the shopper can select any one for the purchase.

Shipping method requirements during checkout

The shopper must select the shipping method, if applicable, during quick and full checkout to proceed. In full checkout, it is a required field on the Delivery date page.

A shipping method is available for selection during checkout if both of the following conditions are met:

- The supplier in the given shipping method is listed in that shipping method's **Supplier** field.
- The delivery location country in the given shipping method is listed in the shipping method's **Supplier delivers to** field.

Shipping method storage and references

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 criterion for grouping purchase requisitions, along with supplier, business owner, and blanket requisition. All purchase lines with the same shipping method are grouped together.

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.

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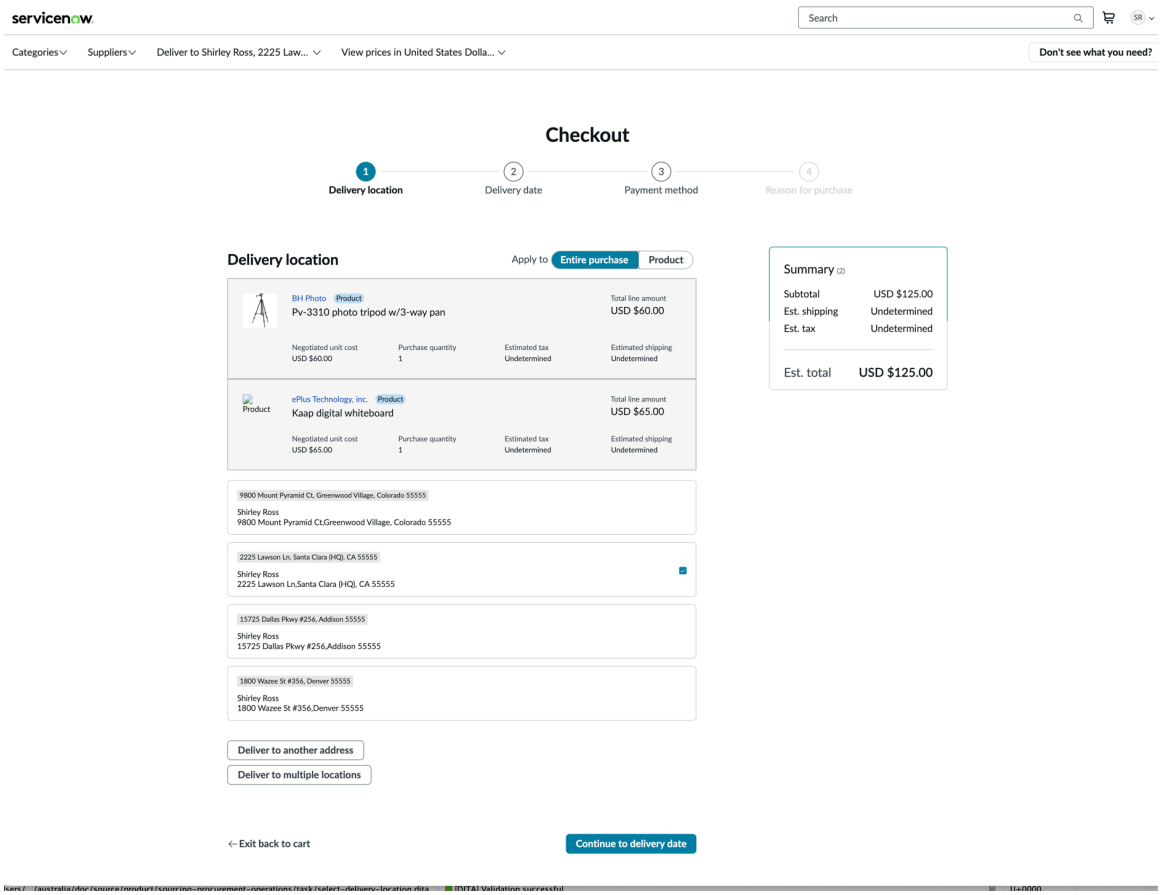
Before you begin

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

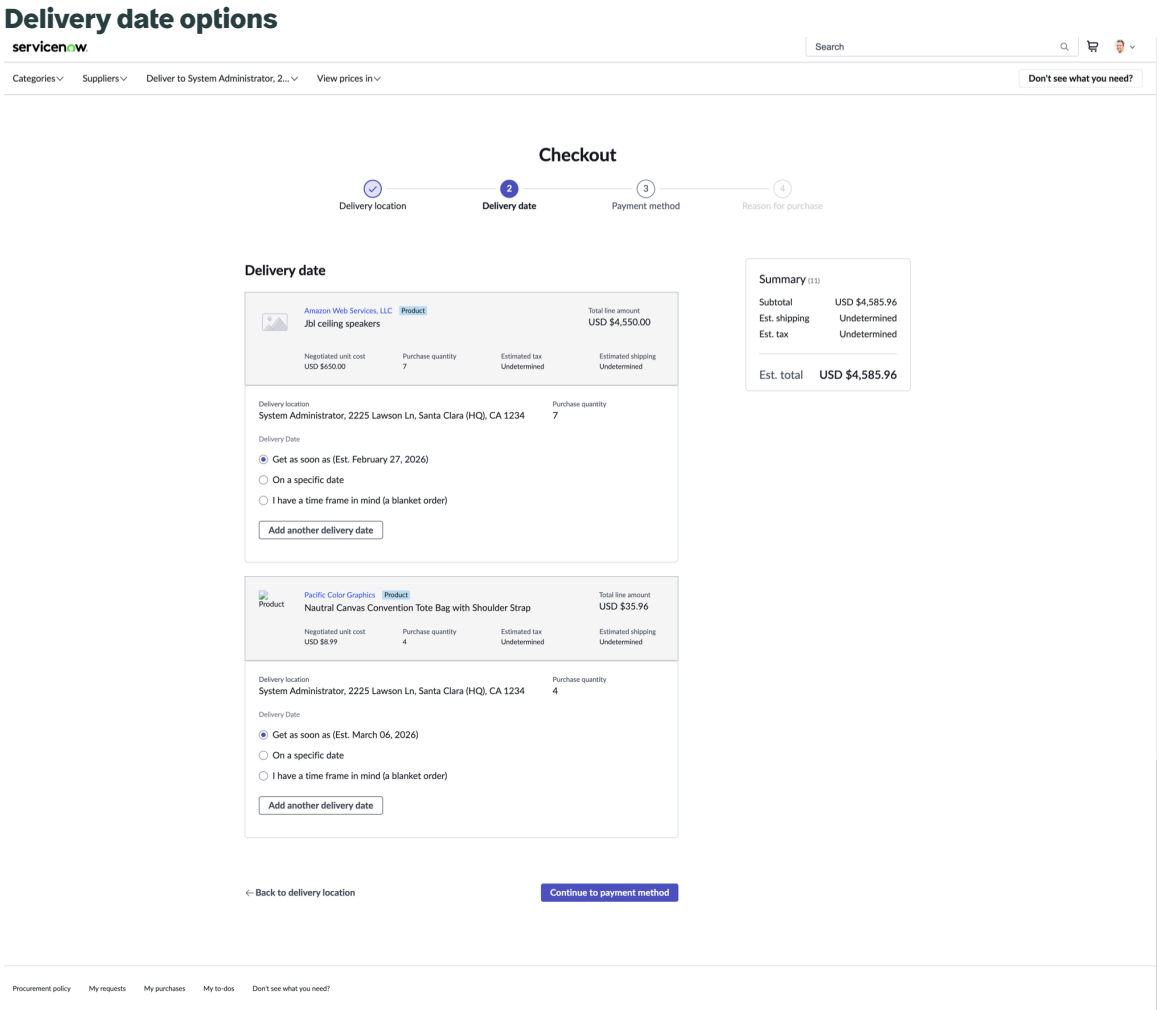
When you are done selecting delivery dates for the products in your cart, you can select payment methods for them. For more information, see Select a payment method.

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Delivery date options

Delivery dates define when goods or services are expected to be delivered and give shoppers flexibility to align deliveries with business needs.

Delivery dates are selected during checkout and are tracked throughout the purchase lifecycle. Delivery date selection applies at the purchase line level, which allows different products, and even the same product, to follow different delivery schedules within a single checkout.



Delivery date selection during checkout

During the **Delivery date** step in the checkout flow, shoppers select delivery dates for each product line. Shopping Hub supports the following options:

- **Get it as soon as possible**: Schedules delivery for the earliest possible date based on supplier lead time and product category. This option is commonly used when no specific delivery timing is required.
- **On a specific date**: Allows the shopper to select an exact delivery date. Shoppers can select a date that is in the past, present, or future. Selecting a past date requires the purchase to be marked as after the fact.
- **I have a time frame in mind (blanket order)**: Allows the shopper to specify an estimated delivery time frame instead of a specific date. Shoppers can select a date range or a term (for example, days, weeks, months, quarters, or years). If a date range is selected, both the requested start and end dates must be entered to proceed. Selecting a time frame creates a

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blanket type order, and no payment method is required during checkout. If the cart includes a product with an eligible credit, the option to provide a time frame is not available.

- **Service delivery dates**: For service-based products, delivery dates are represented using a **start date** and an **end date** instead of a single delivery date. A service time frame can be used when the duration of the service is flexible.

Applying delivery dates to purchases and products

Shopping Hub lets shoppers control how delivery dates are applied during checkout, depending on whether the same delivery schedule applies to all items or to specific products.

- **Entire purchase or individual products**: Shopping Hub provides a toggle that lets shoppers specify whether the delivery date applies to the entire purchase or to individual products in the cart.
- **Conditional toggle display**: The toggle is displayed only when applicable, based on predefined criteria. For example, if there is only a single item in the cart, the toggle does not apply and is not displayed.

Multiple delivery dates for a single product

By default, Shopping Hub assumes that a product is delivered to one location, on one date, and in a single quantity. Shoppers can override this behavior by splitting a product's quantity across multiple delivery schedules during checkout.

- **Add another delivery date**: Allows shoppers to add additional delivery dates for the same product line. If the product has a single quantity, adding delivery dates automatically adds corresponding quantities of the same product. Quantities are recalculated in real time and reflected in the product header card and the Summary section. Each delivery segment can independently use **Get it as soon as possible**, **On a specific date**, or **I have a time frame in mind**.
- **Request single delivery date**: Allows shoppers to revert to a single delivery date after specifying multiple delivery dates. A warning message indicates that all previously selected delivery dates will be removed.
- Common use cases: Partial availability of goods, phased or staggered deliveries, storage or space constraints, and supplier lead-time variations.

Where delivery dates are visible after checkout

After a purchase is submitted, delivery date information remains visible throughout Shopping Hub:

- **My purchases**: Displays delivery information alongside purchase details such as quantity, supplier, and amount.
- **Purchase detail view**: Shows delivery information at both the purchase and line level.
- **View by purchase**: Displays delivery dates summarized at the overall purchase level.
- **View by line**: Displays delivery dates per purchase line, including split delivery schedules and service start and end dates.
- **Purchase details**: Shows delivery-related fields such as expected delivery date (for goods), start and end dates (for services), and the associated delivery location.

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.

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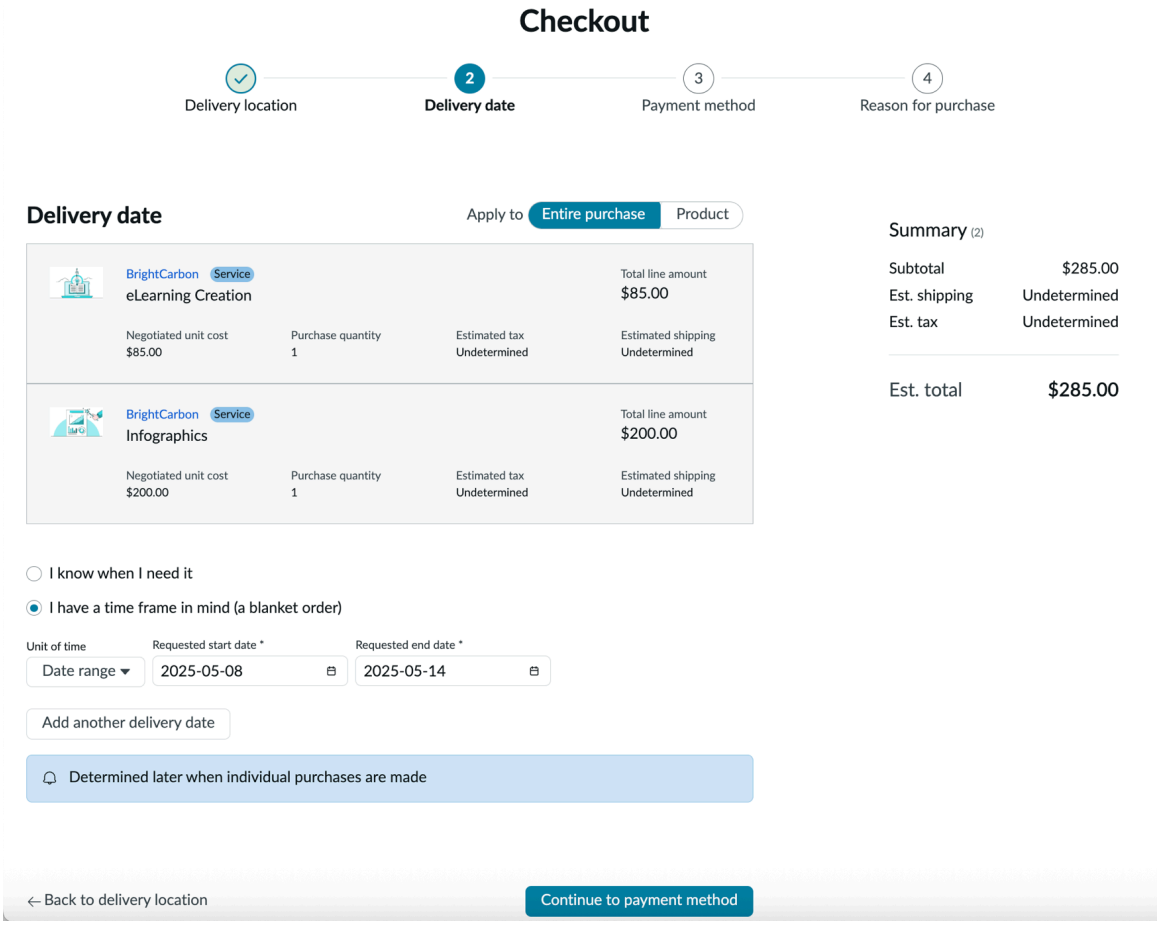
Before you begin

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.

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Payment method options

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

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

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

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

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

Provide a reason for your purchase

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

Before you begin

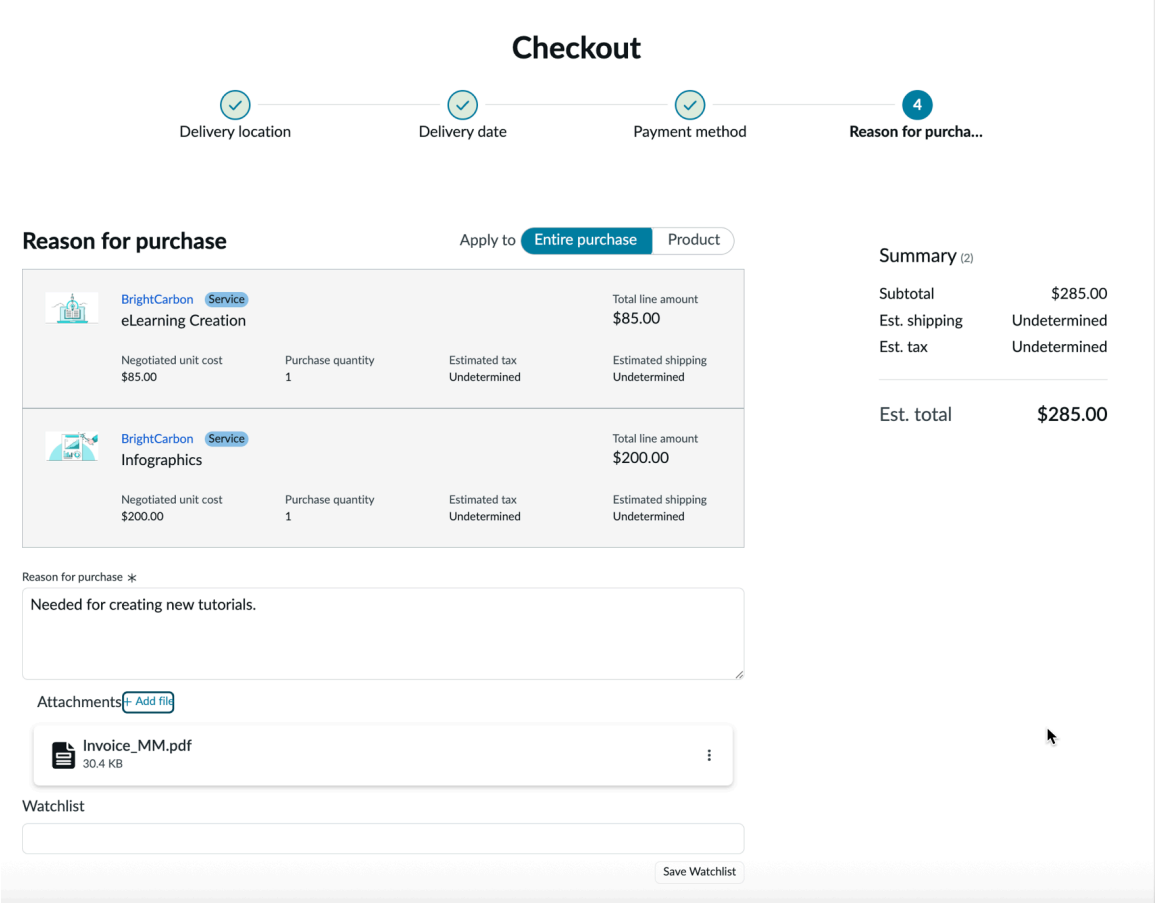
To provide a purchase reason, you should have first selected your desired payment method.

Role required: sn_shop.shopper

Procedure

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

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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.

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.

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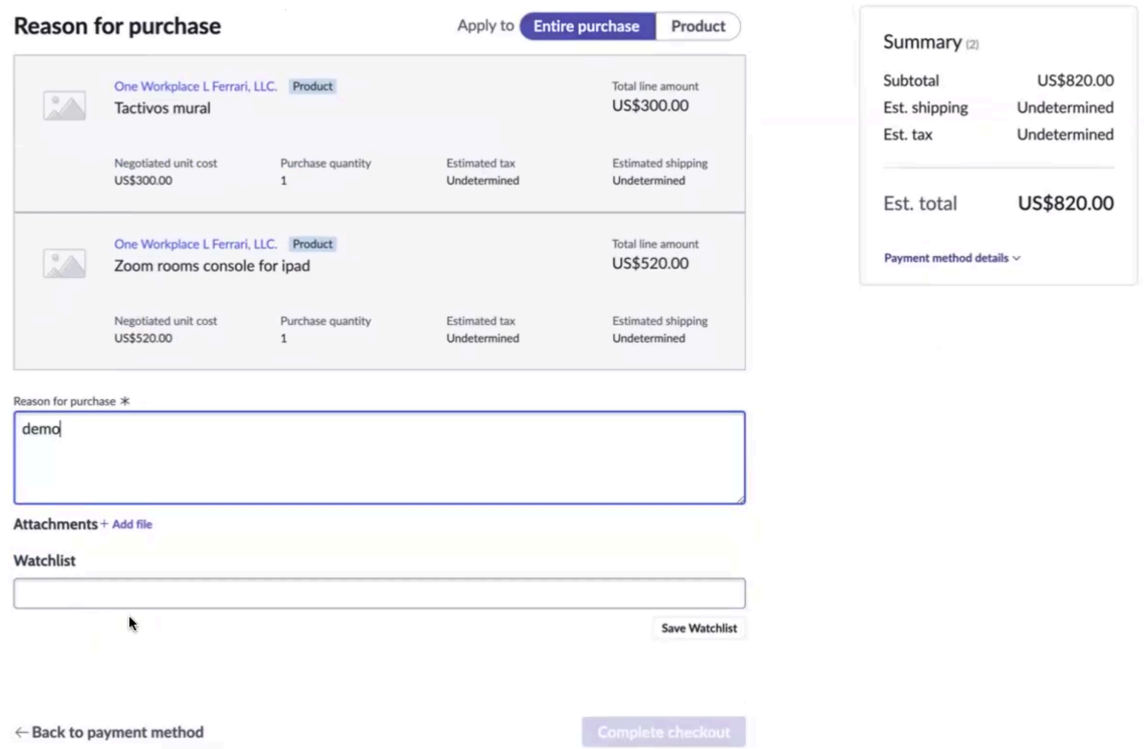
Procedure

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



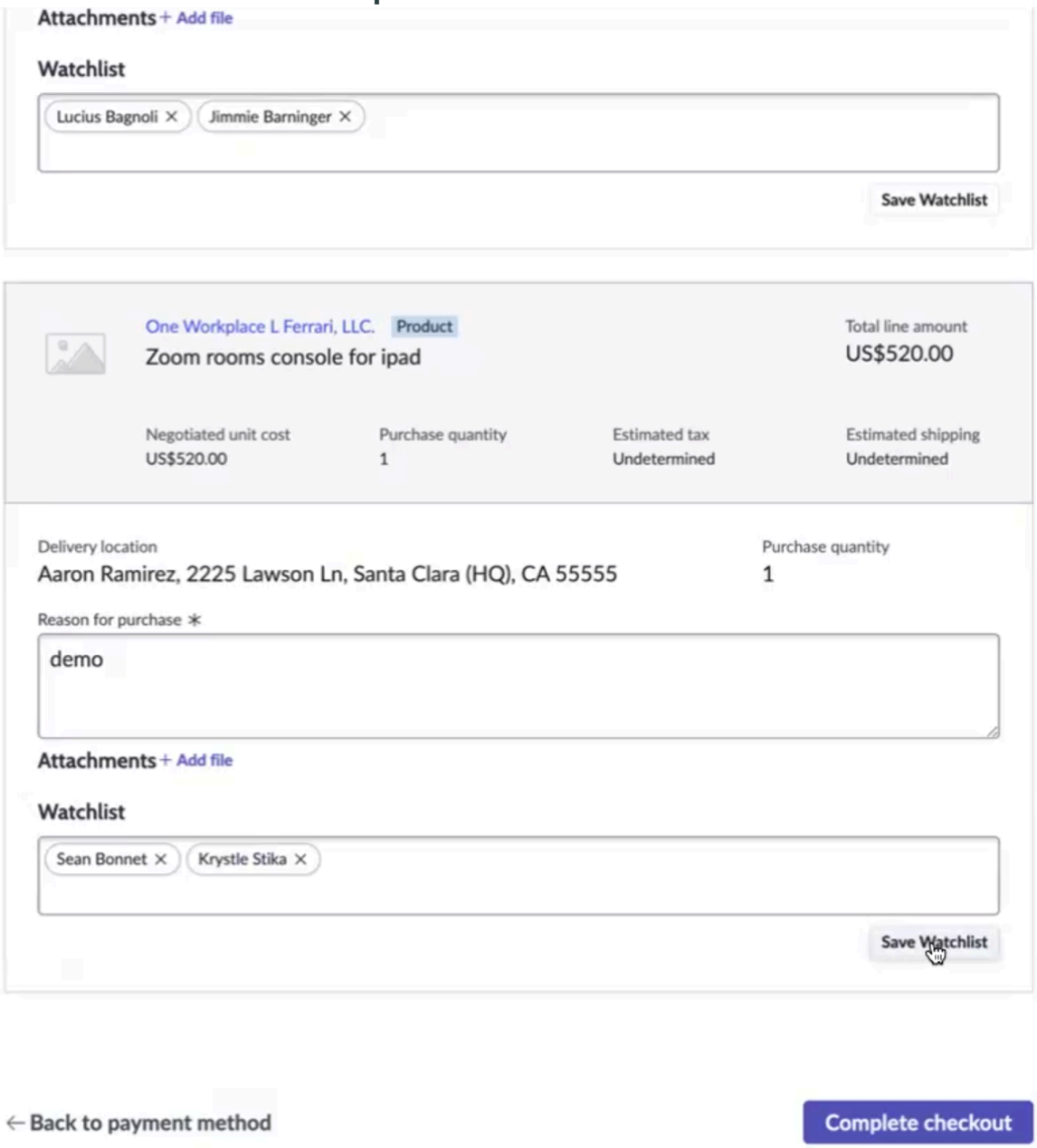
2. In the Reason for purchase page, if you're on the Apply to **Product** view, perform the following steps:

   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.

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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.

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.

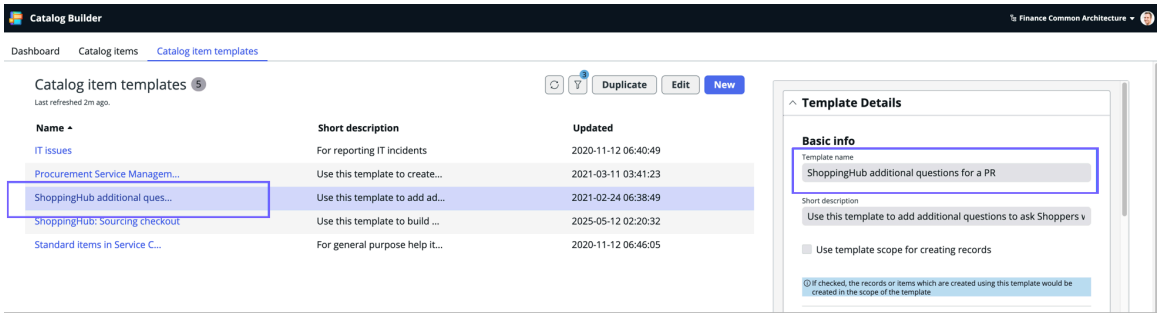
Before you begin

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.

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A record producer can contain the following question types:

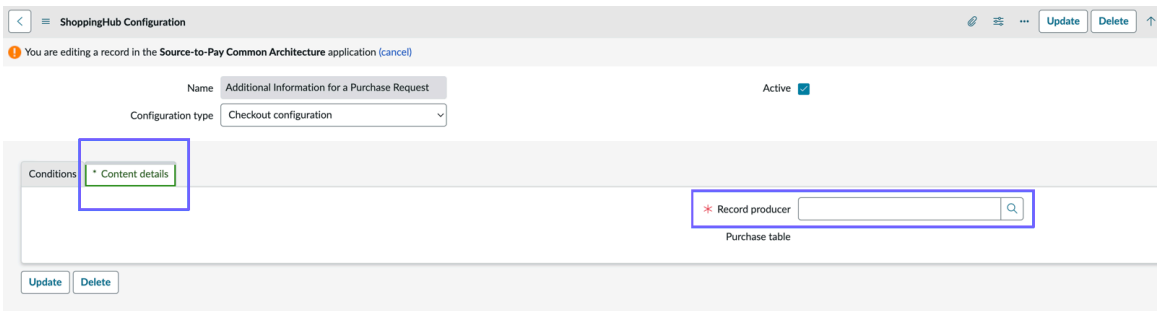
- Text - Single-line
- Text - Multi-line
- Choice - Record references
- Option - Check box
- Choice - Dropdown (fixed values)
- Date

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.



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**.

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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.

Configure line-level questions in ShoppingHub

Create configurable, line-level questions for shoppers to provide the information needed to complete the purchase during the checkout process in Shopping Hub. These questions are defined in Catalog Builder and specific to certain products or product categories.

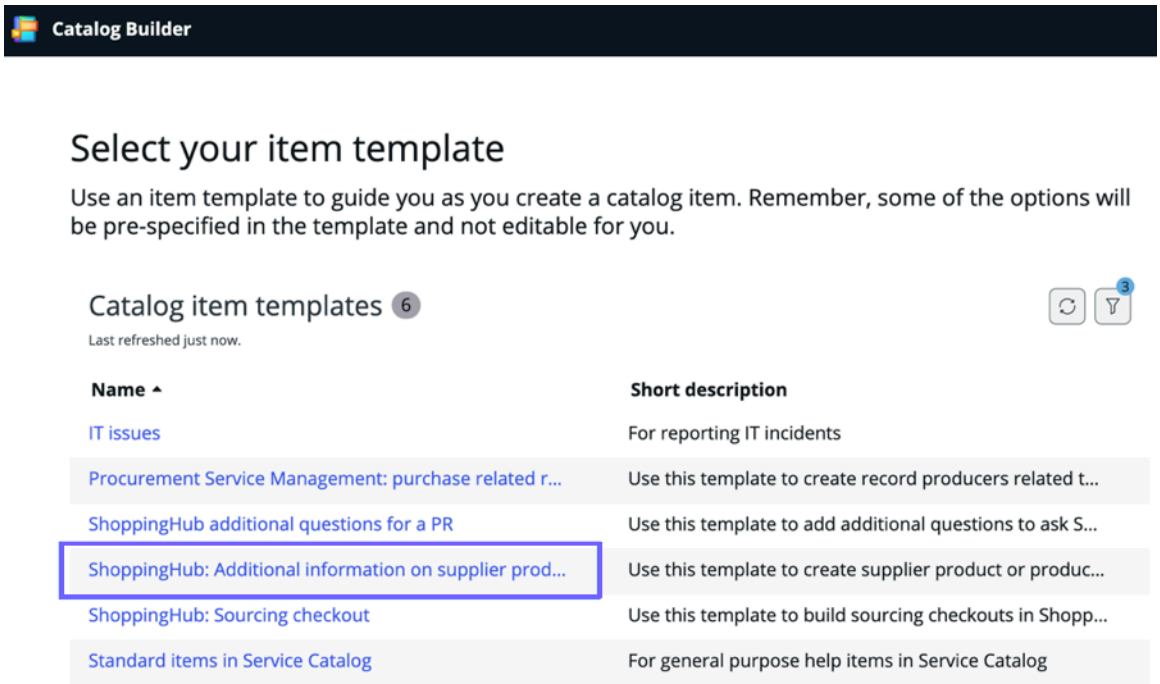
Before you begin

Role required: sn_shop.procurement_administrator

About this task

Plugin required: Shopping Hub (sn_spend_uib)

Create a custom set of questions to ask shoppers during the quick and full checkout for specific products or product categories using a record producer. Build the record producer in Catalog Builder using the **ShoppingHub: Additional information on supplier products or product models or product categories** template. For information on how to create a record producer, see Create a catalog item using a template.



Shopping Hub checks for the existence of the record producer used for the additional information configuration in the specified order:

- Supplier product
- Product model
- Product category
- Parent category
- Supplier(s)

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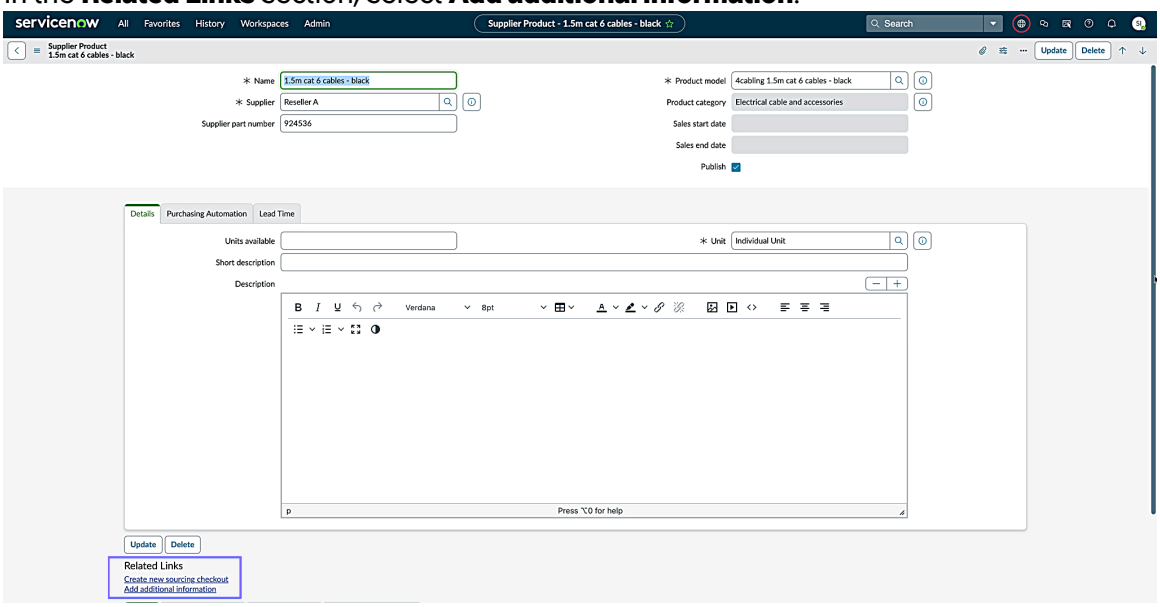
Note: Shopping Hub applies the **Supplier(s)** filter differently depending on which type of match is found:

- For a Product model, Product category, or Parent category match, the **Supplier(s)** field, if set on the configuration, further restricts the question set to products from those suppliers. If **Supplier(s)** is empty on the configuration, the question set applies to products from any supplier.
- For a Supplier product match, **Supplier(s)** is not evaluated, because a supplier product is already specific to a single supplier.
- If none of the above match, Shopping Hub makes one more attempt: it looks for a configuration that has **Supplier(s)** set but no **Supplier product**, **Product model**, or **Product category**, and applies its question set to any product from that supplier.

For example, if a configuration has **Product category** set to Name Badge and **Supplier(s)** set to Banner, the question set applies only to Name Badge products supplied by Banner. A Name Badge product supplied by Office Depot would not receive this question set unless a separate configuration matches it.

Procedure

1. Navigate to one of the following:
   - **All** > **Sourcing and Purchasing Automation**, **Primary Data**, or **Supplier Product**
   - **All** > **Product Catalog** > **Product Models** > **Model Categories**
   - **All** > **Product Catalog** > **Product Models** > **All Models**
2. Select and open a record for a supplier product, product model, or a model category.
3. In the **Related Links** section, select **Add additional information**.



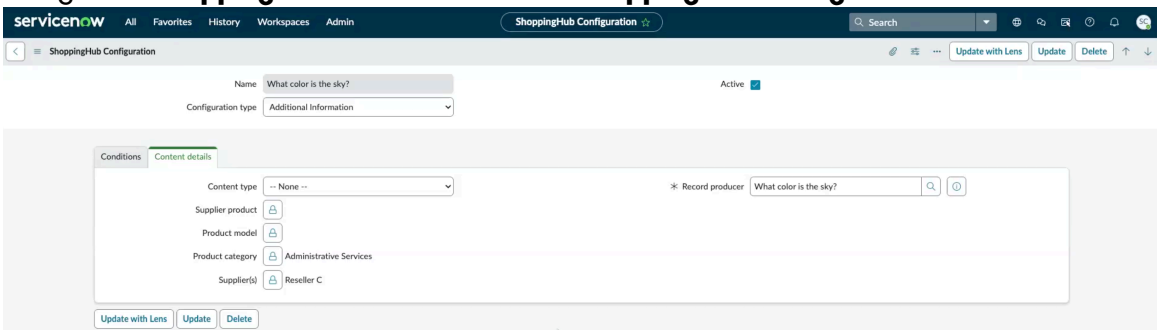
The Create record producer page opens in Catalog Builder.

4. In Catalog Builder, configure a record producer using the **ShoppingHub: Additional information on supplier products or product models or product categories** template. This record producer is used to store additional 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.

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5. Navigate to **ShoppingHub** > **Administration** > **ShoppingHub Configuration**.



6. In the **Name** field, enter a name for the configuration.
7. In the **Configuration type** field, select **Additional Information**.
8. In the **Content details** tab, complete one or more of the following fields.
   - In the **Supplier product** field, search for and add a supplier product for which you want to display additional information at checkout.
   - In the **Product model** field, search for and add a product model for which you want to display additional information at checkout.
   - In the **Product category** field, search for and add a product category for which you want to display additional information at checkout.
   - In the **Supplier(s)** field, search for and add one or more suppliers to limit the product model or product category question set to supplier products from those suppliers. This field is optional and is read-only when the configuration contains a supplier product.
9. In the **Record producer** field, search for and select the record producer you created.
   You must first create this record producer using the **ShoppingHub: Additional information on supplier products or product models or product categories** template.
10. Select **Submit**.
    The questions added in the record producer for a specific product, product model, or product category appear during checkout in Shopping Hub.

Checkout data loss scenarios

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

This happens if you perform any of the following actions:

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

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

Purchase line creation scenarios

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

For a supplier product:

- Every new delivery location creates a separate purchase line.
- Different delivery dates create separate purchase lines.

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- 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 ShoppingHub or Employee Center and make purchases. They can view the third-party purchases in the My purchases page on ShoppingHub, and also view the shipment records received from the third-party sites.

External suppliers on ShoppingHub

Shoppers who are part of the punchout group can view punchout or external third-party supplier sites from the following tabs or widgets in ShoppingHub Home after navigating to **All** > **ShoppingHub** > **ShoppingHub Home**.

- **Suppliers** > **Supplier sites**: 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 about the checkout experiences for shoppers based on whether they have installed Employee Center, Shopping Hub, or both, see Shopper checkout experiences based on installed applications.

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**.

Shoppers are redirected to the Supplier sites page, with all the punchout suppliers listed there. They can sort and search the list for specific suppliers. Selecting a supplier tile takes them to the external site for making the purchase. For more information about the checkout experiences for shoppers based on whether they have installed Employee Center, Shopping Hub, or both, see Shopper checkout experiences based on installed applications.

For more information on Employee Center, see Sourcing and Procurement Operations integration with Employee Center.

Post checkout from external supplier sites

After successfully completing a checkout at an external third-party supplier site, a shopper can view the third-party purchase requisition in the My purchases page from ShoppingHub Home. The purchase requisition record contains details of the third-party supplier, purchase lines with product names, and the associated approvals, contracts, and cases.

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

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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 ShoppingHub.

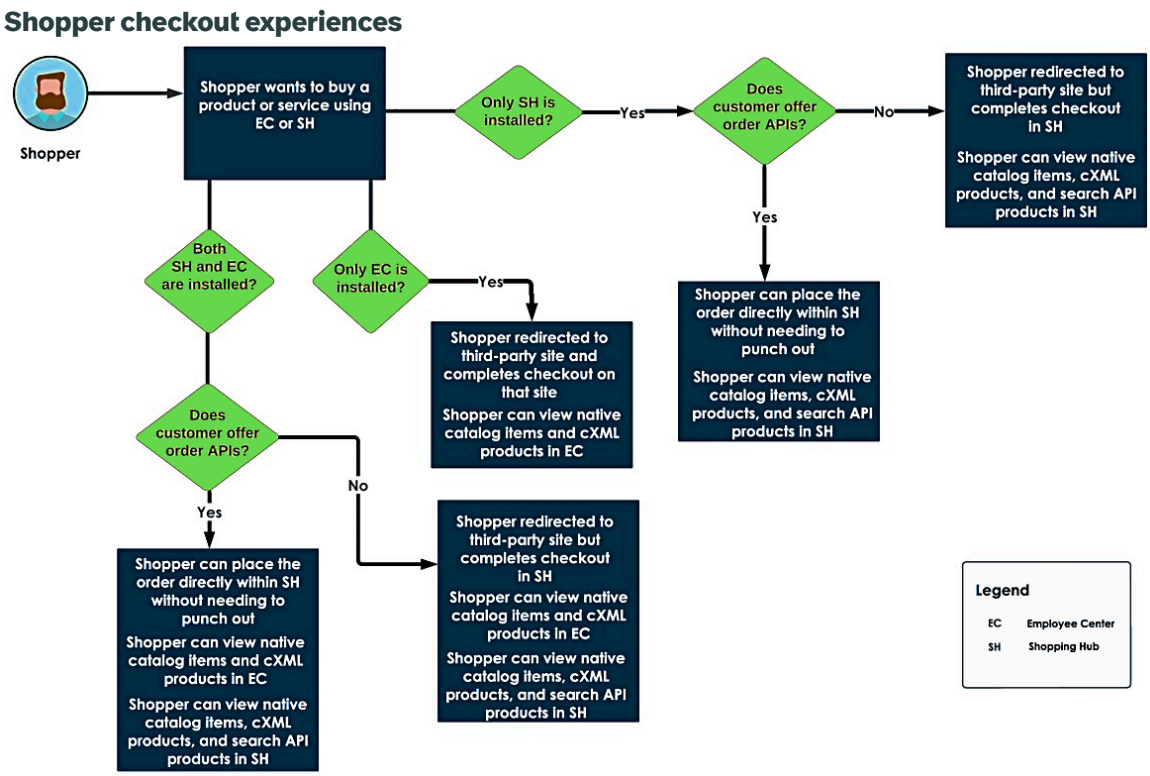
Troubleshooting errors

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.

Shopper checkout experiences based on installed applications

The following figure illustrates the checkout experiences for shoppers based on whether they have installed Employee Center, Shopping Hub, or both.



Unified request tracking in Shopping Hub

You can search for purchased products and services by entering the original purchase record ID or its associated record IDs in Shopping Hub. This includes tracking details from the ordering stage to the fulfillment stage of the procurement process.

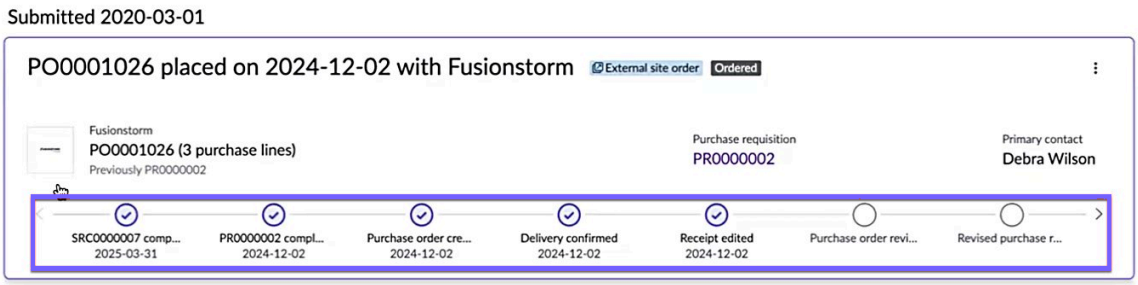
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Additionally, you can use keywords or the first three letters of a record to find products. For instance, searching for "Laptop" will display a list of laptops purchased. Similarly, typing "SRC" shows all sourcing requests, typing "PRL" displays purchase requisition lines, and so on.

Note: The search results include all records, regardless of their current status. Even closed records are shown in the search results.

For example, suppose you created a sourcing request (SRC0000007) to purchase a product. As the product progressed through the procurement process, the sourcing request converted into a purchase requisition (PR0000002), which then became a purchase order (PO0001026).

Shopping Hub showing the progression of your purchases



Navigate to **ShoppingHub** > **ShoppingHub Home** > **My purchases**. In the search field, search for any of the records, SRC0000007, PR0000002, or PO0001026, to access complete details about your purchase.

Note: The purchase card displays the timeline of all previously closed procurement records, providing the shopper with the necessary context to understand the purchase history.

Hide supplier pricing from ShoppingHub

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

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

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

- Product information card on the ShoppingHub catalog
- Product details or categories or suggestions based on your role landing page
- Supplier product card, on both ShoppingHub and Virtual Agent
- Product header card in your shopping cart
- Summary section during full checkout and also on Virtual Agent
- Quick checkout overlay
- Purchase confirmation page after quick and full checkouts
- **Total line amount** and **Budget** fields in the My purchases list view, on both desktop and mobile
- **Total line amount** in the header, and price fields **Subtotal**, **Tax**, **Shipping**, and **Total line amount** in the purchase section in the Purchase details page, on both desktop and mobile

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- Activity stream in My purchases
- **Pre-payment amount** field in the **Pre-payments** tab on the purchase details page
- **Negotiated unit cost** field in the **Additional quotes** tab on the purchase details page
- **Total line amount** field in the **Submitted purchases** tab on the purchase details page
- Approval to-do in the **To-dos** tab on the purchase details page
- **Total line amount** and **Remaining amount** fields in the blanket purchase list view, on mobile
- **Total line amount** and **Remaining amount** in the blanket purchase form view header, on mobile
- **Total line amount** field in the Submitted purchases related list of a blanket purchase order, on mobile
- **Negotiated unit cost** and **Total line amount** fields in the Additional quotes related list of a blanket purchase order, on mobile
- Confirmation page after completing a select a supplier to-do
- Line amount invoiced in invoice acknowledgment

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

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

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

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

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

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

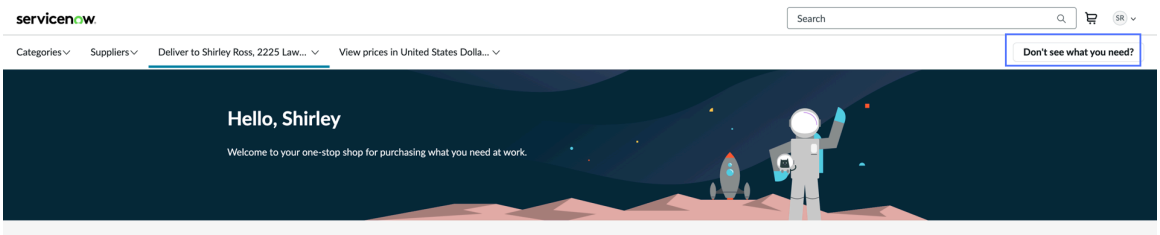
Place a request for one or more products that are currently not listed on the Shopping Hub portal. You can do this from Shopping Hub Home or directly from Employee Center.

Before you begin

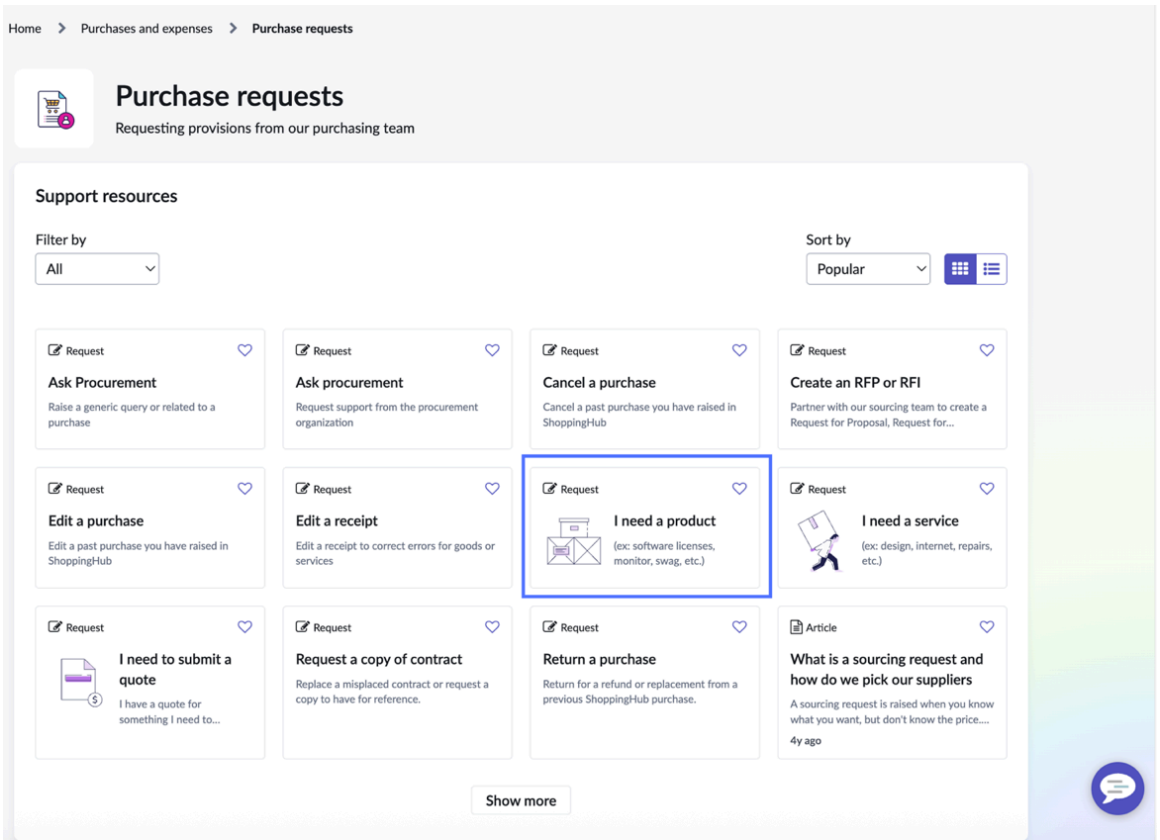
Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Select **Don't see what you need?**.



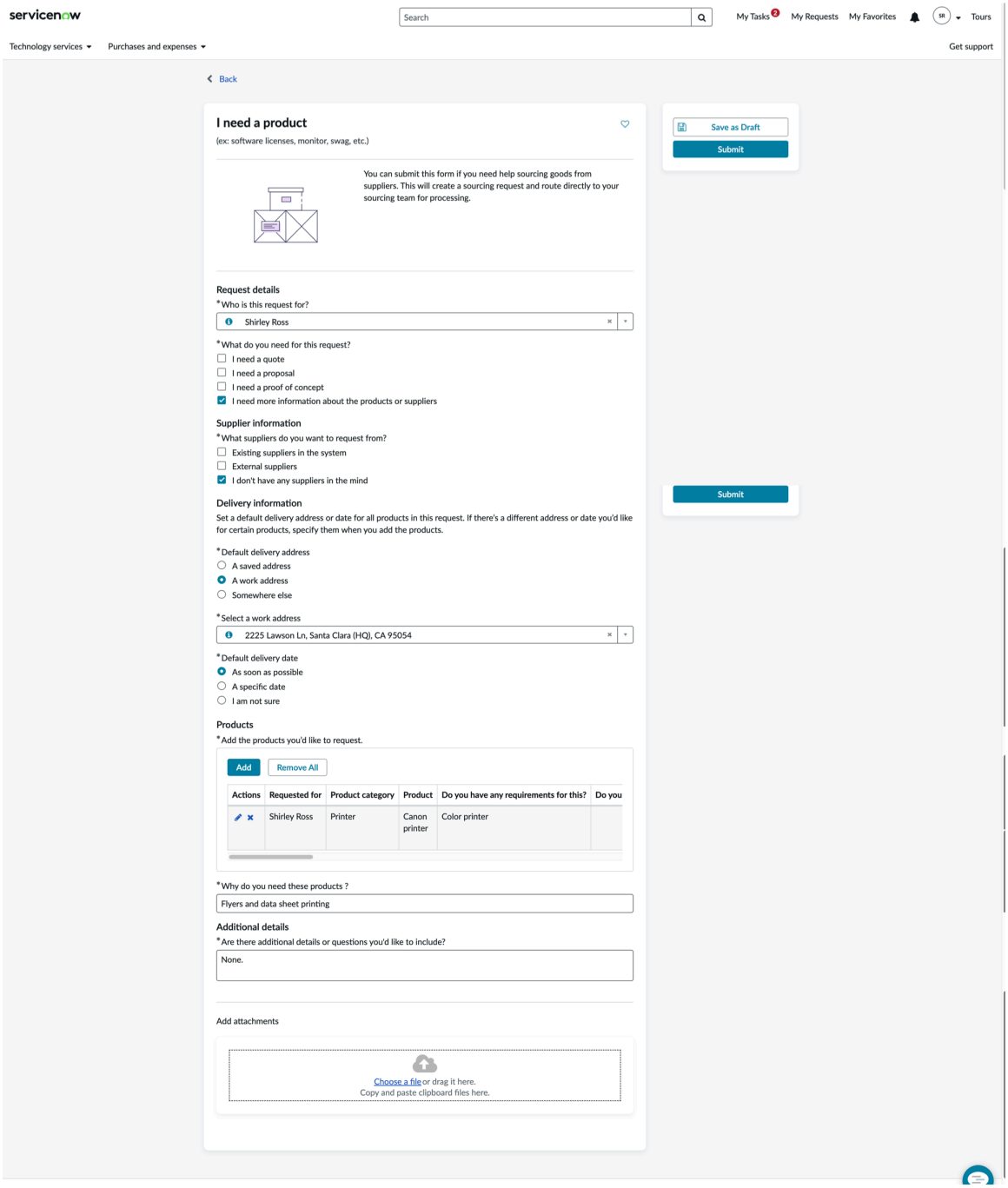
The Purchase requests page is displayed from the Employee Center catalogs.



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

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3. Select **I need a product**.
4. On the form, fill in the details of the products that you're looking for.



I need a product form

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.

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Field	Description
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: ○ 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:

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Field	Description
	○ 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.
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.

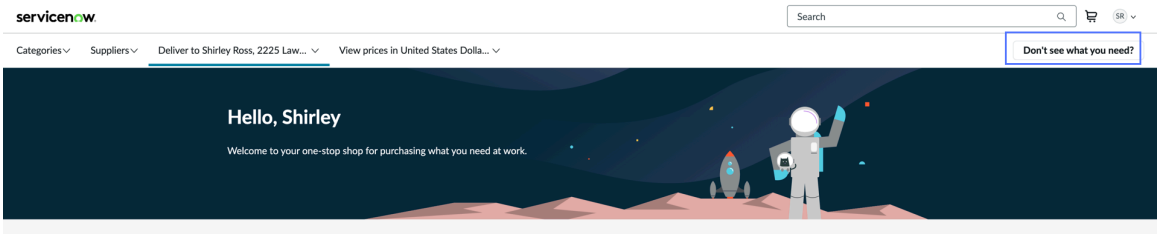
Before you begin

Role required: sn_shop.shopper

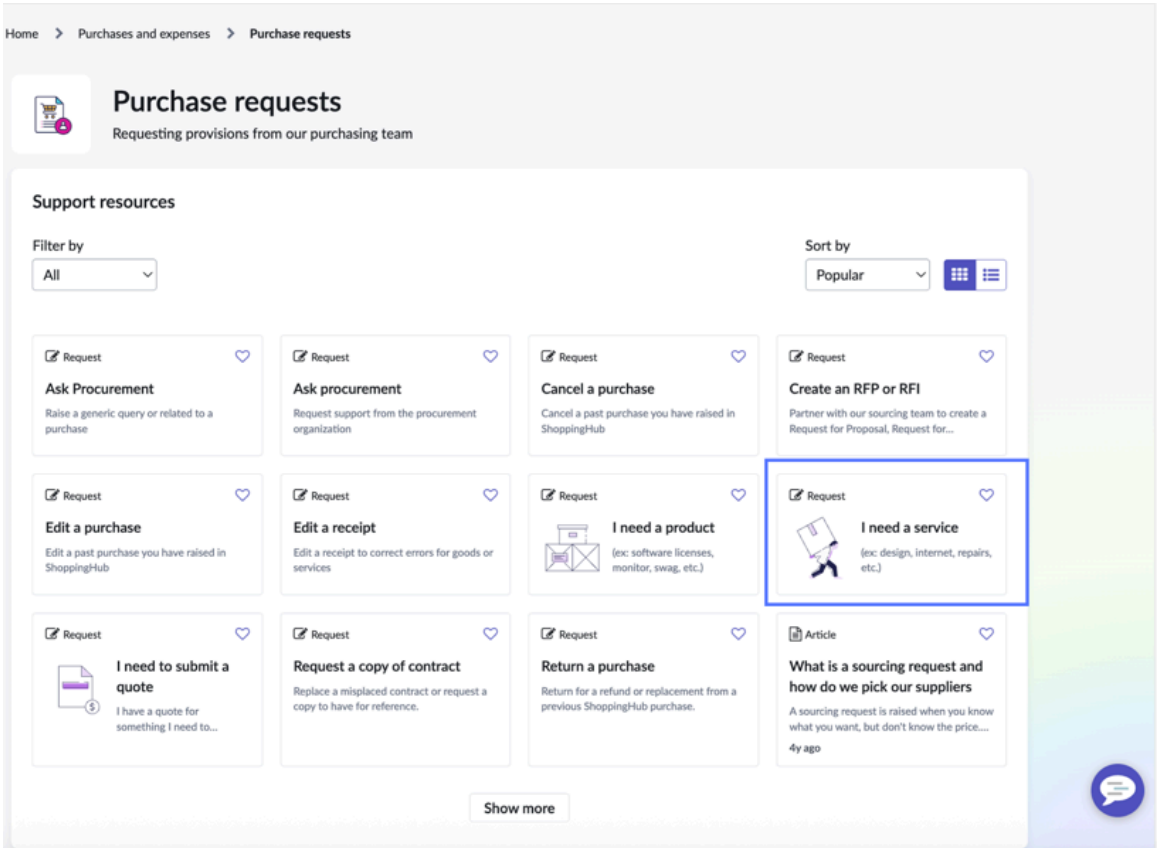
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Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. Select **Don't see what you need?**.



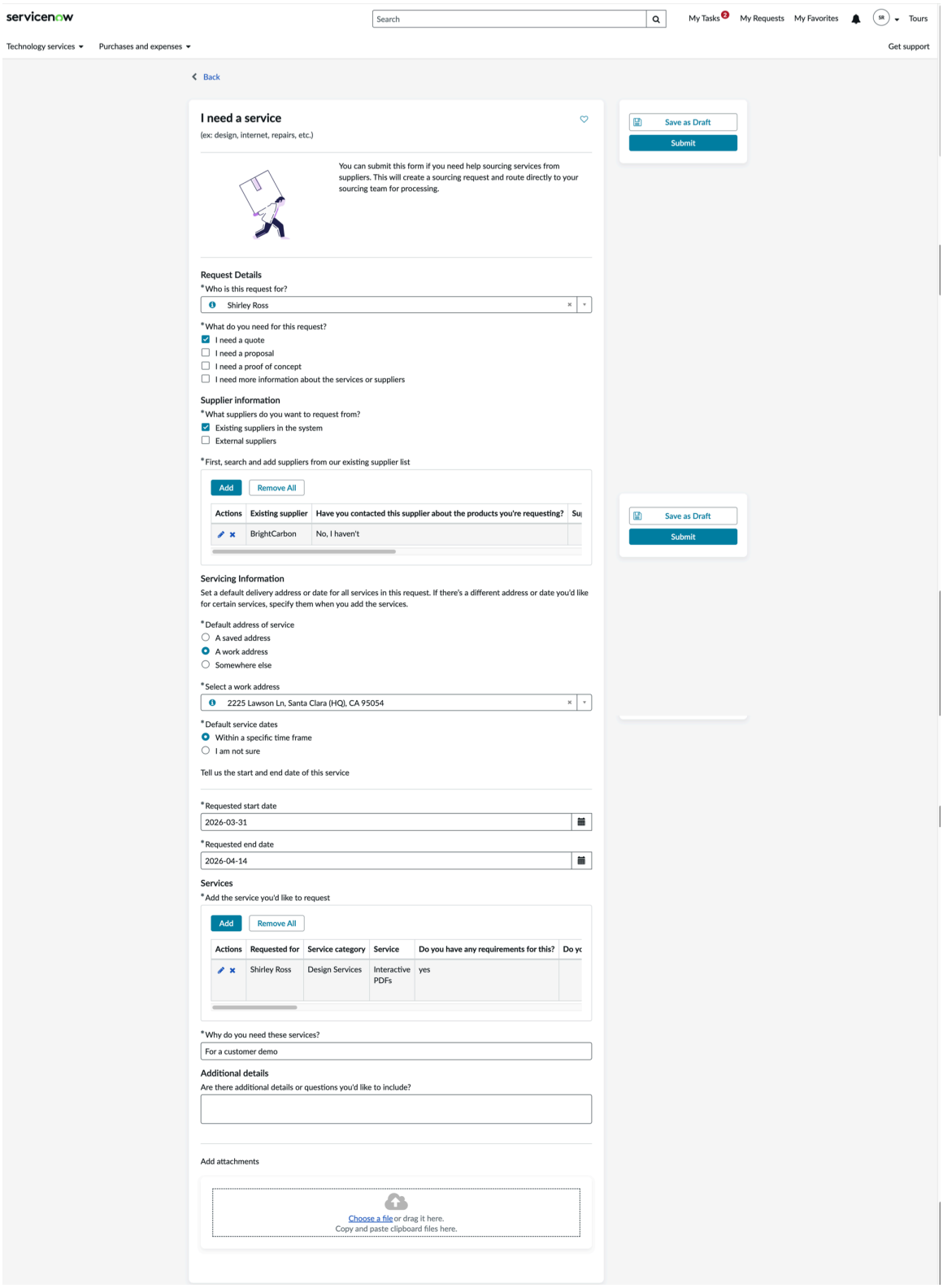
The Purchase requests page is displayed from the Employee Center catalogs.



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

3. Select **I need a service**.
4. On the form, fill in the details of the services that you're looking for.

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I need a service form

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

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Field	Description
	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: ○ 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:

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Field	Description
	○ 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.

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.

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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.

   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.

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Submit a quote fields

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.

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: ○ **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.

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Field	Description
	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**.

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.

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When you install the Playbooks for Sourcing and Procurement Operations application, you can automate the overall purchase revision flows.

Related topics

Purchase revision roles and responsibilities

Purchase revision roles and responsibilities

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

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

Administrator

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

Shopper

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

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

Agent

As an agent or fulfiller or buyer, you can process these requests from the Source-to-Pay Workspace playbook:

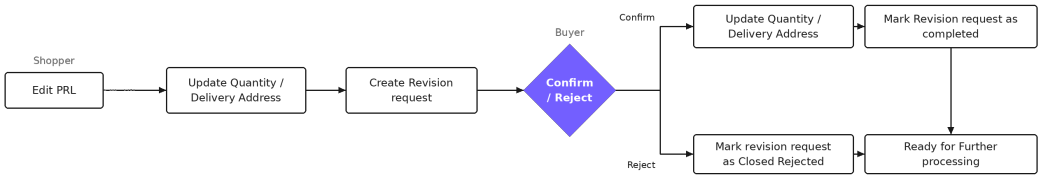
- Approve or reject an **Edit** order with the revised quantity or delivery location of the purchase requisitions.
- Reject or approve a **Cancel** request of the entire order or line items.

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.

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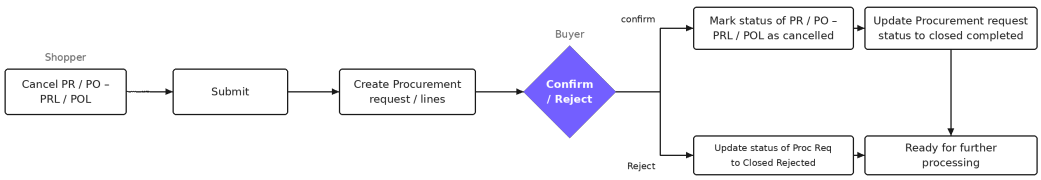
Edit request overview



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



Edit a purchase line from a purchase requisition or order

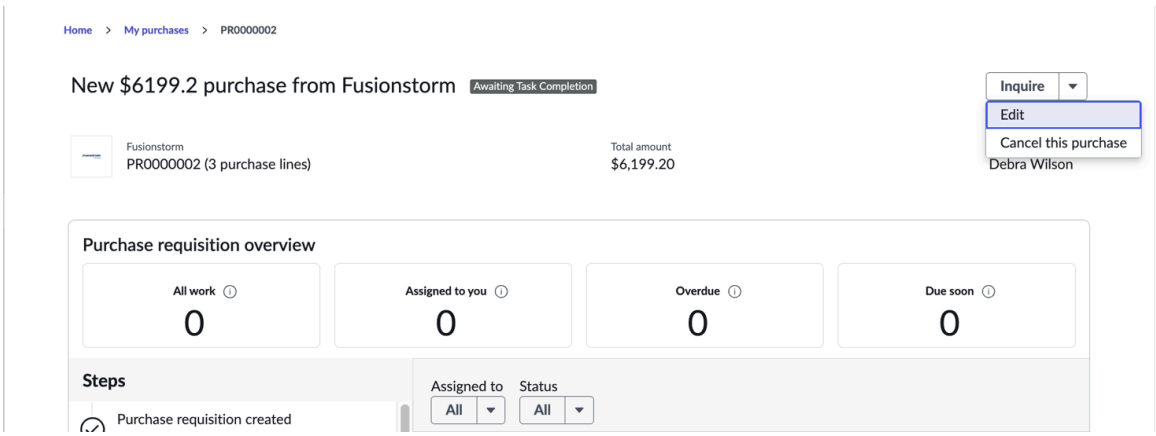
You can edit and revise the quantity of a product or delivery location of a purchase line directly from a purchase requisition or order. You can also view the existing or current quantity or delivery date of the purchase requisition or order.

Before you begin

Role required: sn_spend_psd.requestor or shopper

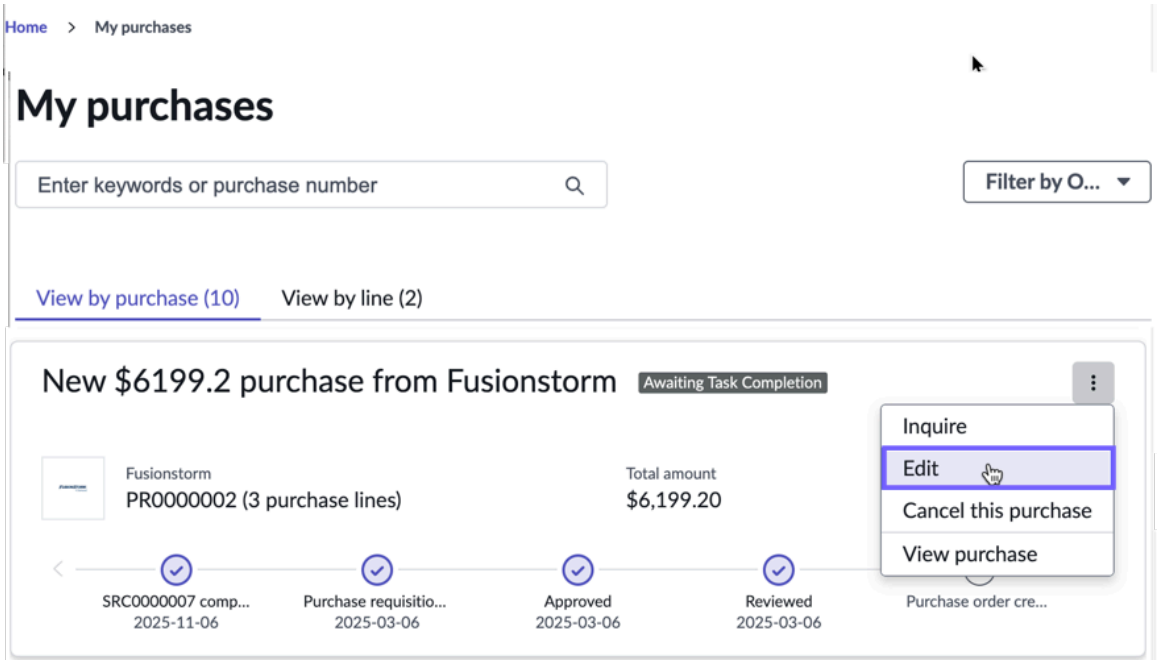
Procedure

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 from Employee Center (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.

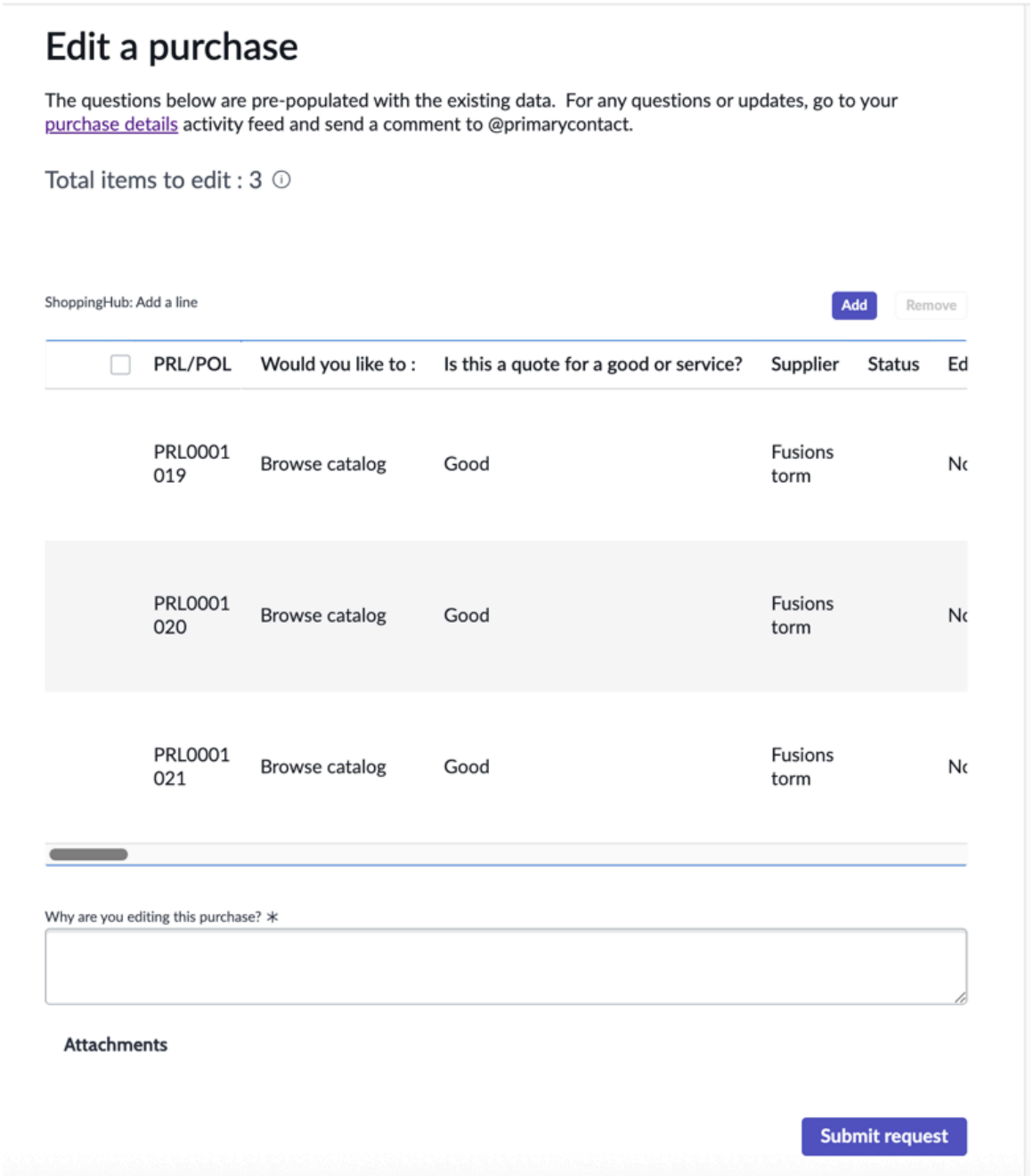
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Note: Remember that the **Edit** option isn't available for purchases in the Closed state.

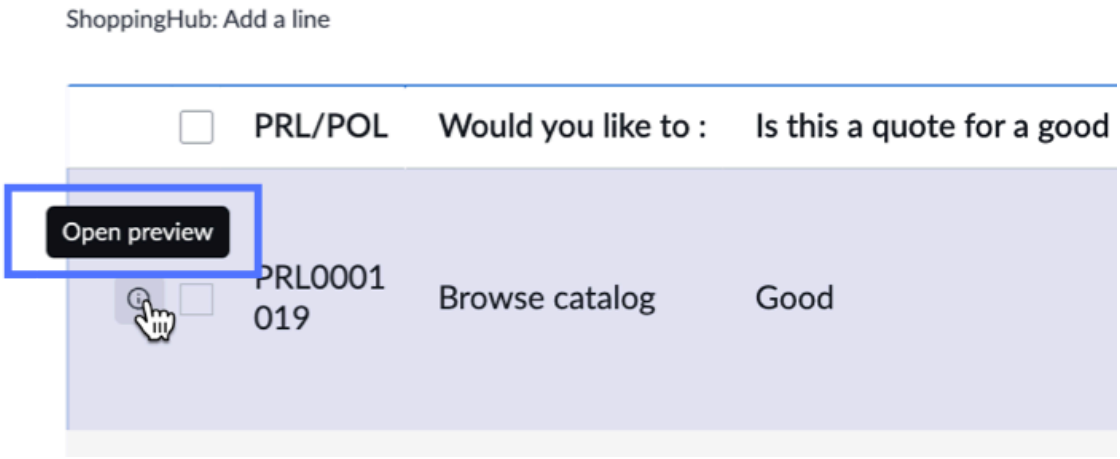
The Edit a purchase page is displayed with the available purchase lines.

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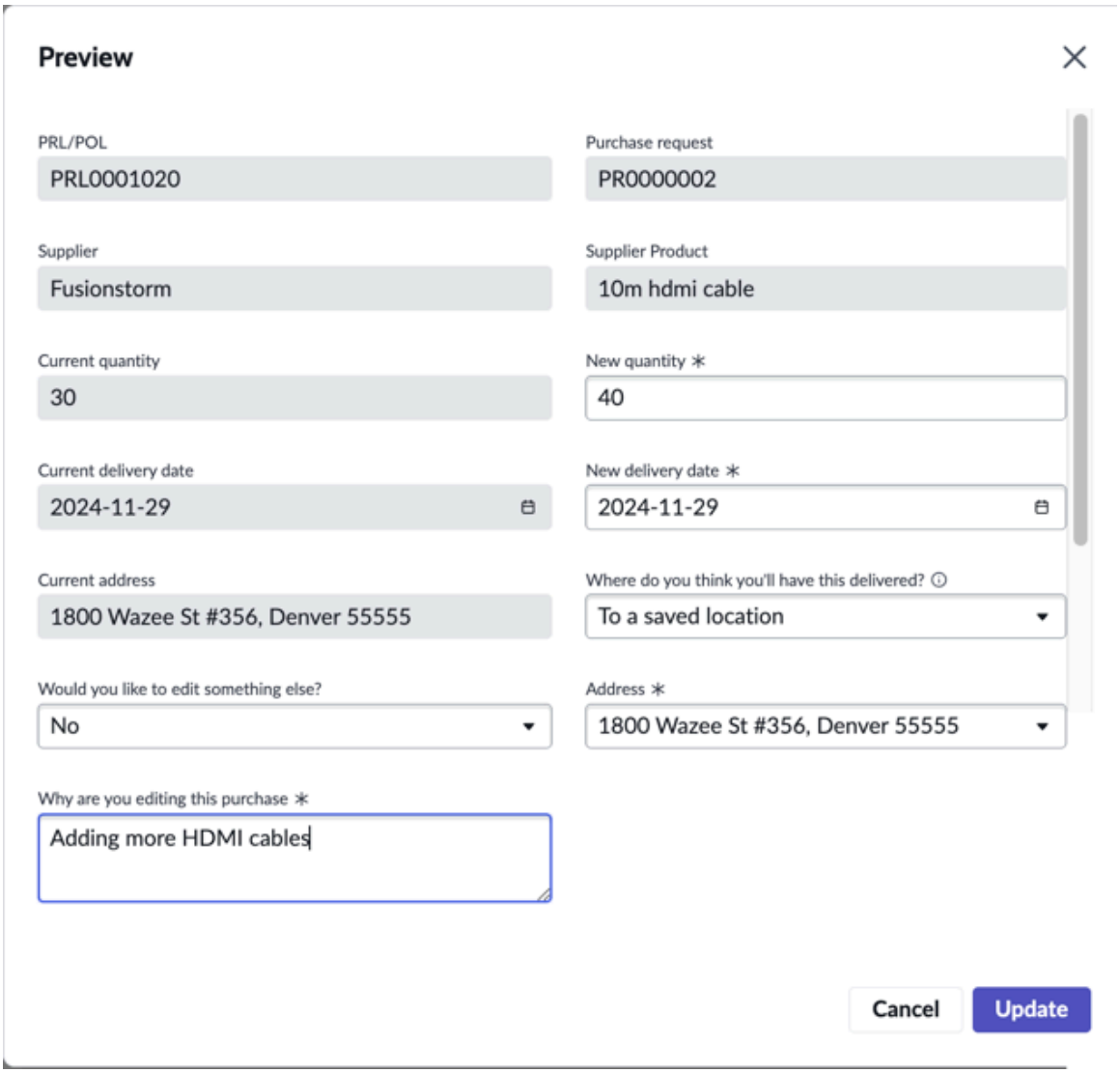
3. Select the Open Preview icon to edit the quantity or delivery location of the purchase line.

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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.



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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.
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.

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Field	Description
	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.
Add attachments	Browse and select the related attachments for updating the purchase requisition or order.

5. Select **Submit**.
   The purchase line is updated with the changes.

Add a line to an existing purchase requisition or order

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

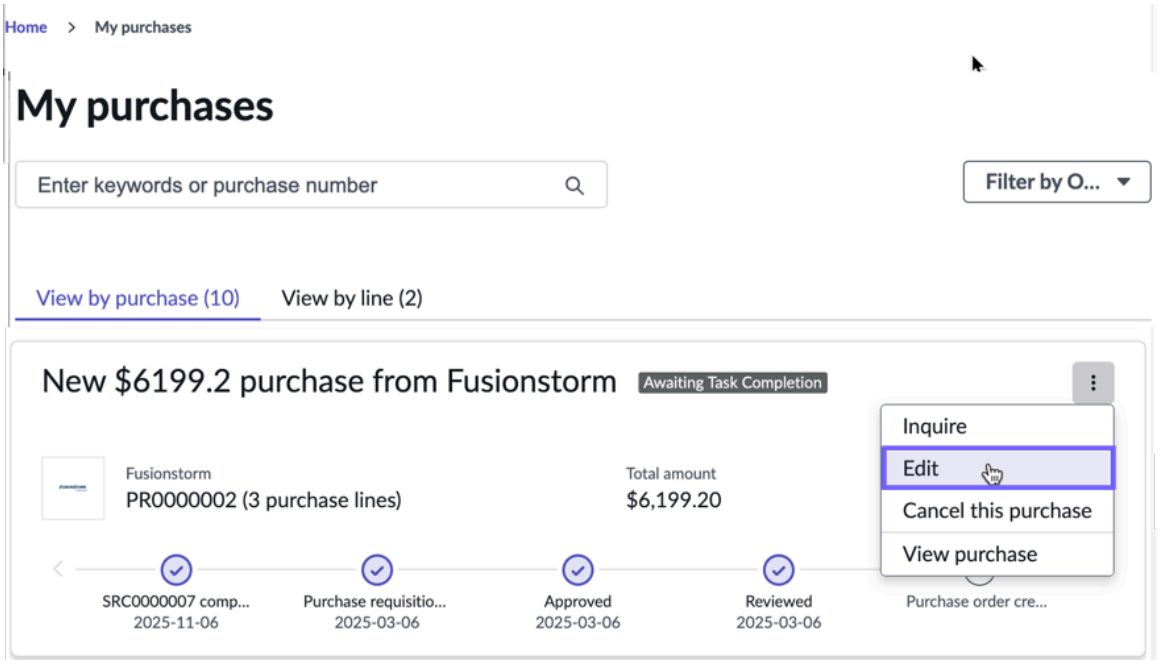
Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

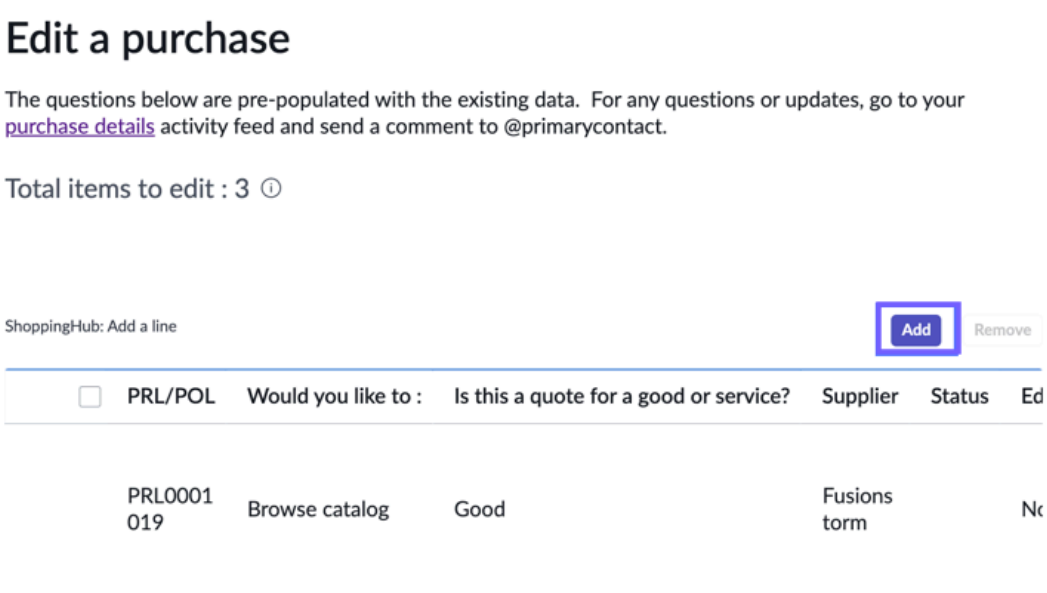
1. Navigate to **All** > **ShoppingHub Home** > **My purchases**.
2. Select a purchase requisition or order and select **Edit** from the **More options** icon.

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

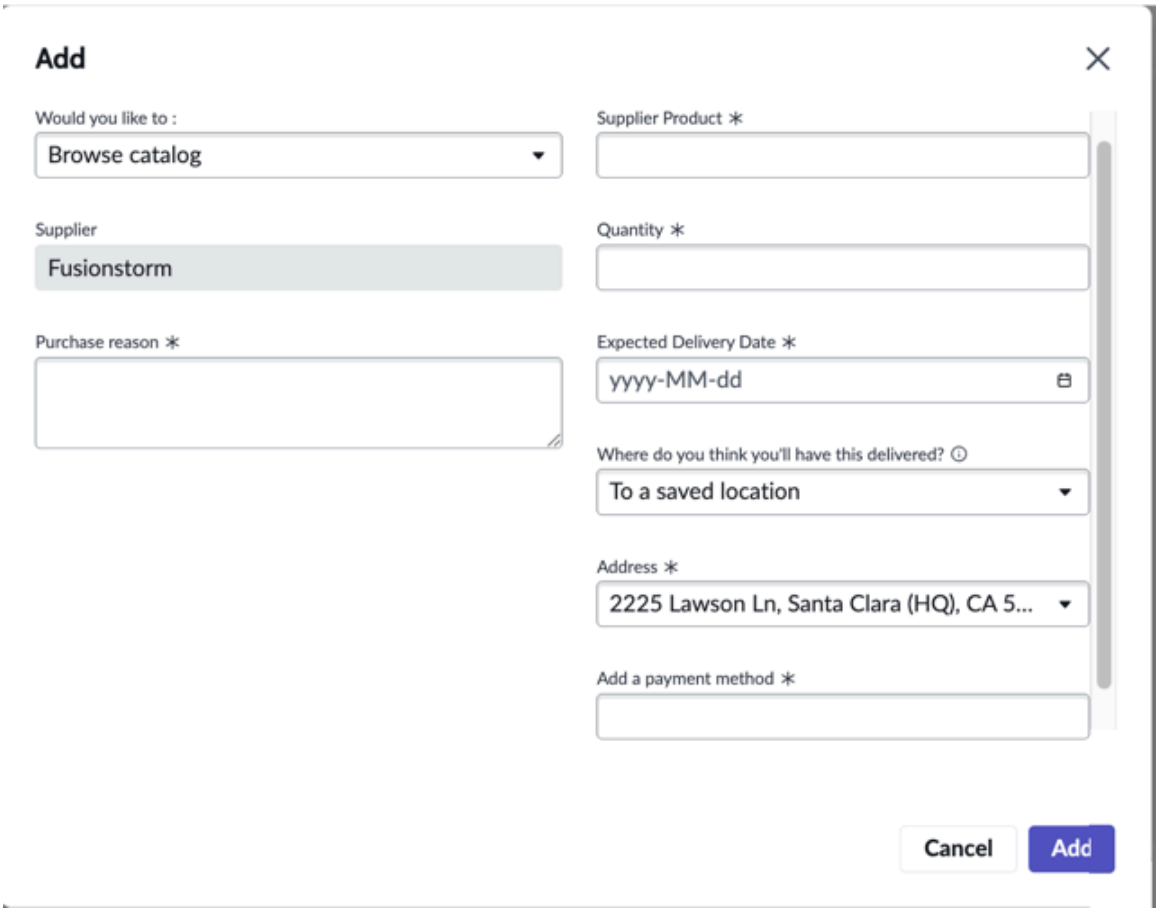
3. Select **Add** to add a new line.



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:

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- **Browse catalog**



Browse catalog form

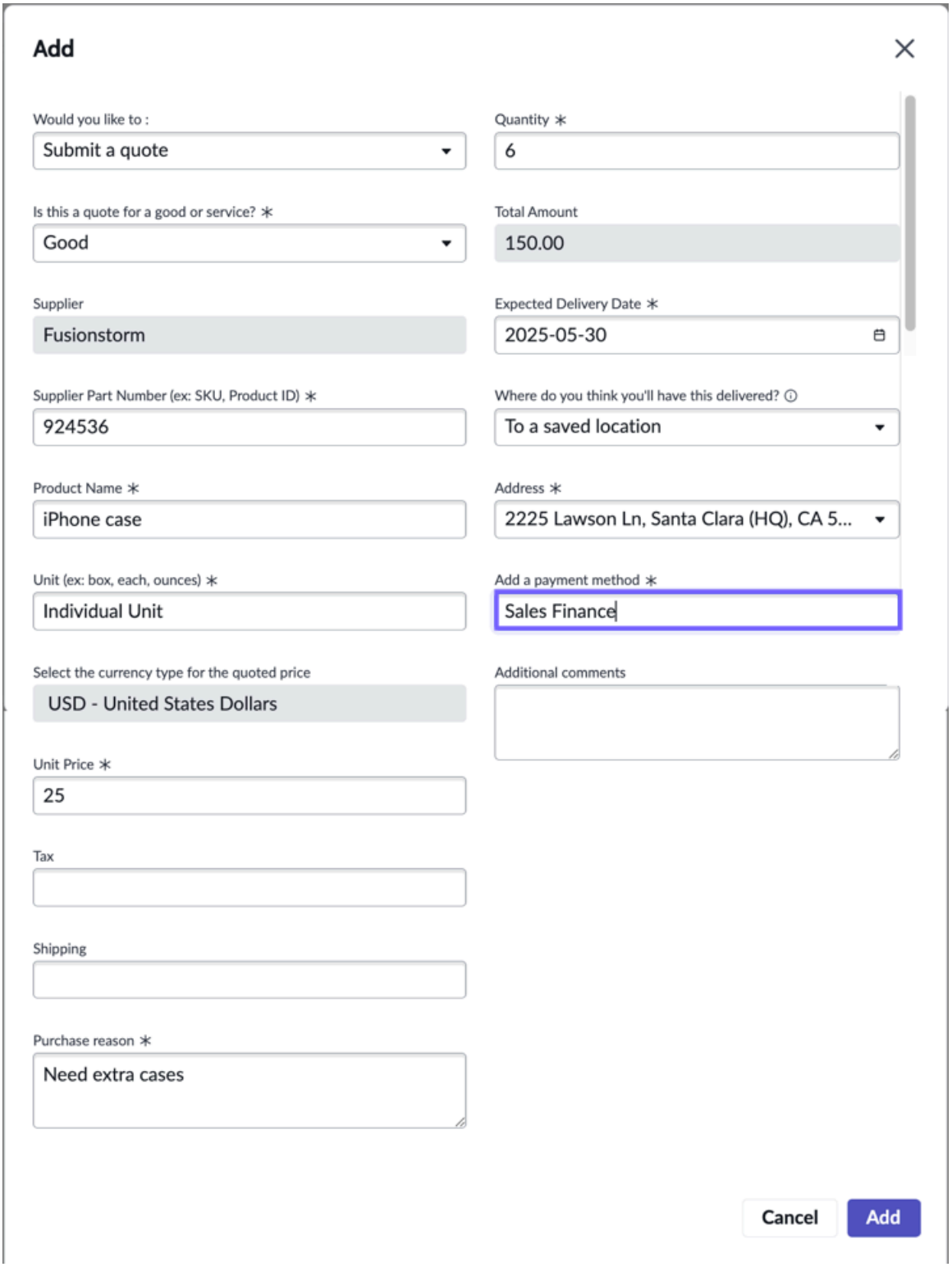
Field	Description
Would you like to:	Select **Browse catalog** to select from a pre-existent supplier and catalog.
Supplier	Displays the supplier name.
Supplier Product	Select a relevant product to purchase from the list.
Quantity	Enter the numerical quantity of the product to purchase.
Expected delivery 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.

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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 The delivery location available for selection is filtered based on the countries supplier can deliver to.
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**

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Submit a quote form

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.

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Field	Description
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.
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.

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Field	Description
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 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 from Employee Center (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.

Edit purchase form

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.

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Field	Description
	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: ○ To one of my saved locations ○ To an office location ○ To a new address For example, you can select an office location.

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Field	Description
	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 **Source-to-Pay Workspace**.

Related topics
Purchase revision flows

Process Automation Designer flows for playbook

Edit a purchase order line

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

Before you begin
Role required: sn_spend_psd.requestor or shopper

Procedure
1. Navigate to **ShoppingHub Home** > **My purchases**.
   Alternatively, you can edit a purchase from **Employee Center** > **Purchase and Expense** > **Purchase Requests** > **Edit a purchase**. For more information, see Edit a purchase line from a purchase requisition or order from Employee Center (EC).
2. Select a purchase order and a purchase order line in it.

Note: Remember that the **Edit** option isn't available for purchases in the Close state.

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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 see Current delivery date and New delivery date fields. If it's a service, you see Current start date, New start date, Current end date, and New end date.

For goods, you see the fields related to delivery dates, for service lines, you see the fields related to service dates.

Purchase summary fields

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.
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.

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Field	Description
	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 drop-down 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. When the case is closed, the file is attached to the purchase order associated with that procurement case.
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 **Source-to-Pay Workspace**.

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Related topics

Purchase revision flows

Process Automation Designer flows for playbook

Edit a purchase line from a purchase requisition or order from Employee Center (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

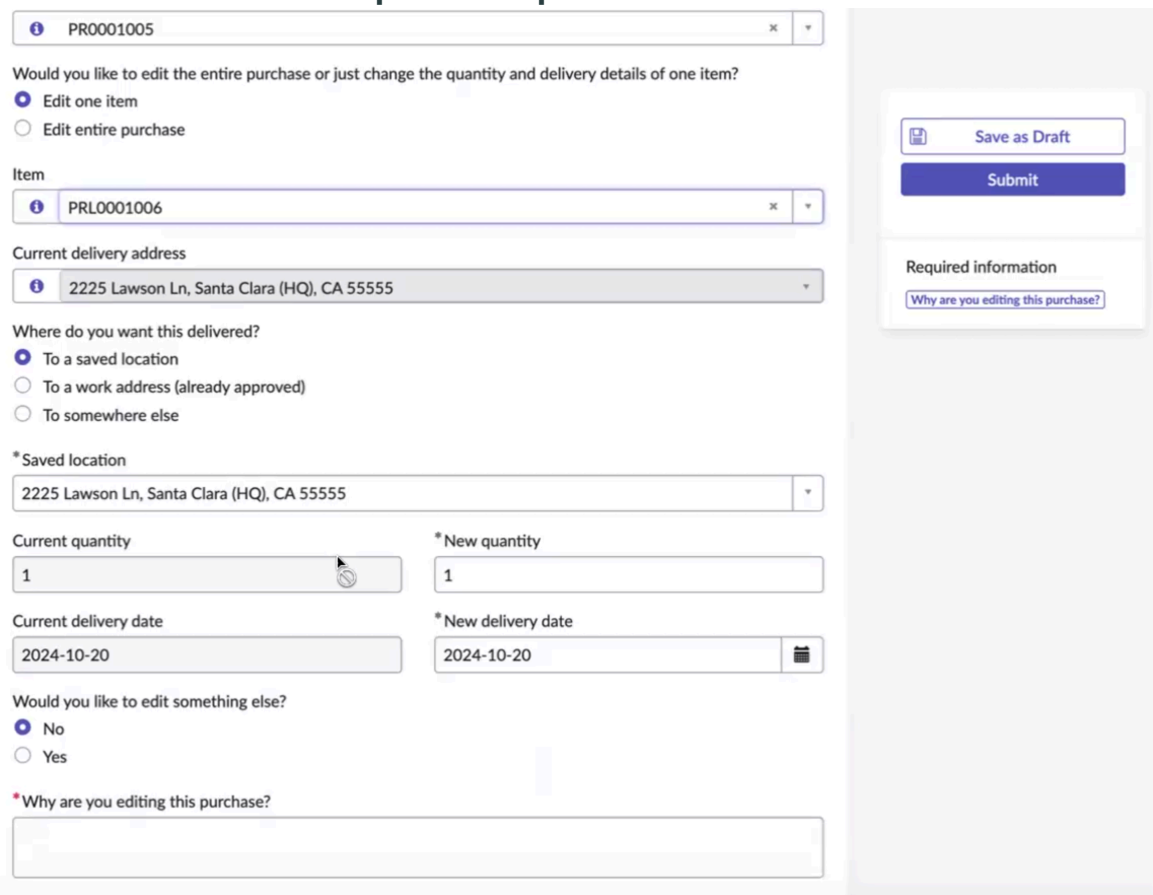
1. Navigate to **Employee Center** > **Purchase and Expense** > **Purchase Requests** > **Edit a purchase**.
   Alternatively, from ShoppingHub Home, select **Don't see what you need?** > **Edit a purchase**.
2. Look up the required purchase requisition or order using the search option.
   You can find 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



Purchase request or order fields

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:

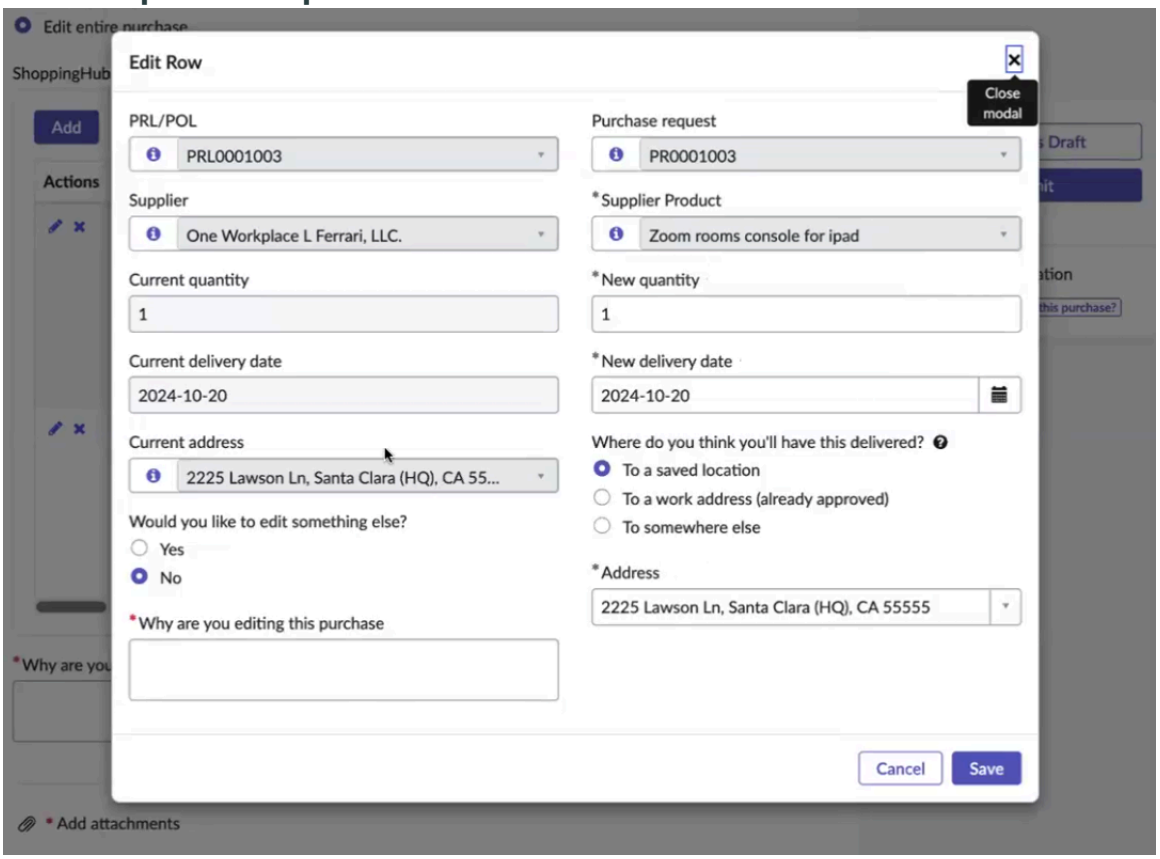
   a. Look up the required purchase request using the search option.
   You can find the required purchase requisition or order using the purchase requisition number, short description, purchase order (PO) number, or ERP number.

   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



Edit purchase request fields

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.
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.

6. Select **Save**.
7. Add an attachment to support your edit request, if applicable.
8. Select **Submit**.
   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.

Editing purchase requisitions and orders with cost allocation adjustments

As a shopper, you can modify purchase requisitions (PRs) and purchase orders (POs) while maintaining cost allocation across multiple cost centers.

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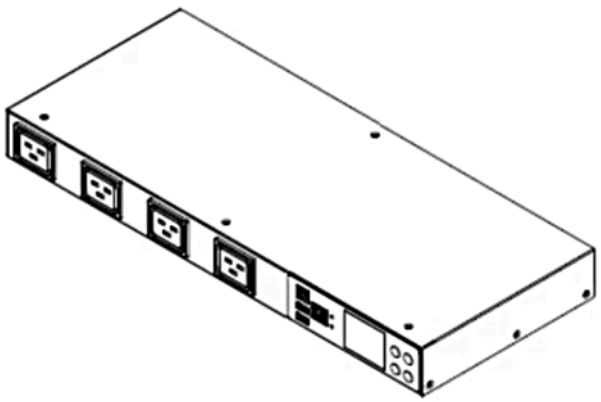
Example use case for editing a purchase with multiple cost centers

In this example, a shopper creates a PR with cost allocation distributed between two cost centers, Customer Success and Engineering. The costs are assigned based on predefined percentages.

Suppose 20% is allocated to Customer Success and 80% to Engineering.



If you purchase 6 quantities of the energy monitoring device priced at $230 each. The total cost amounts to $1380.





The cost for this purchase is allocated as follows:

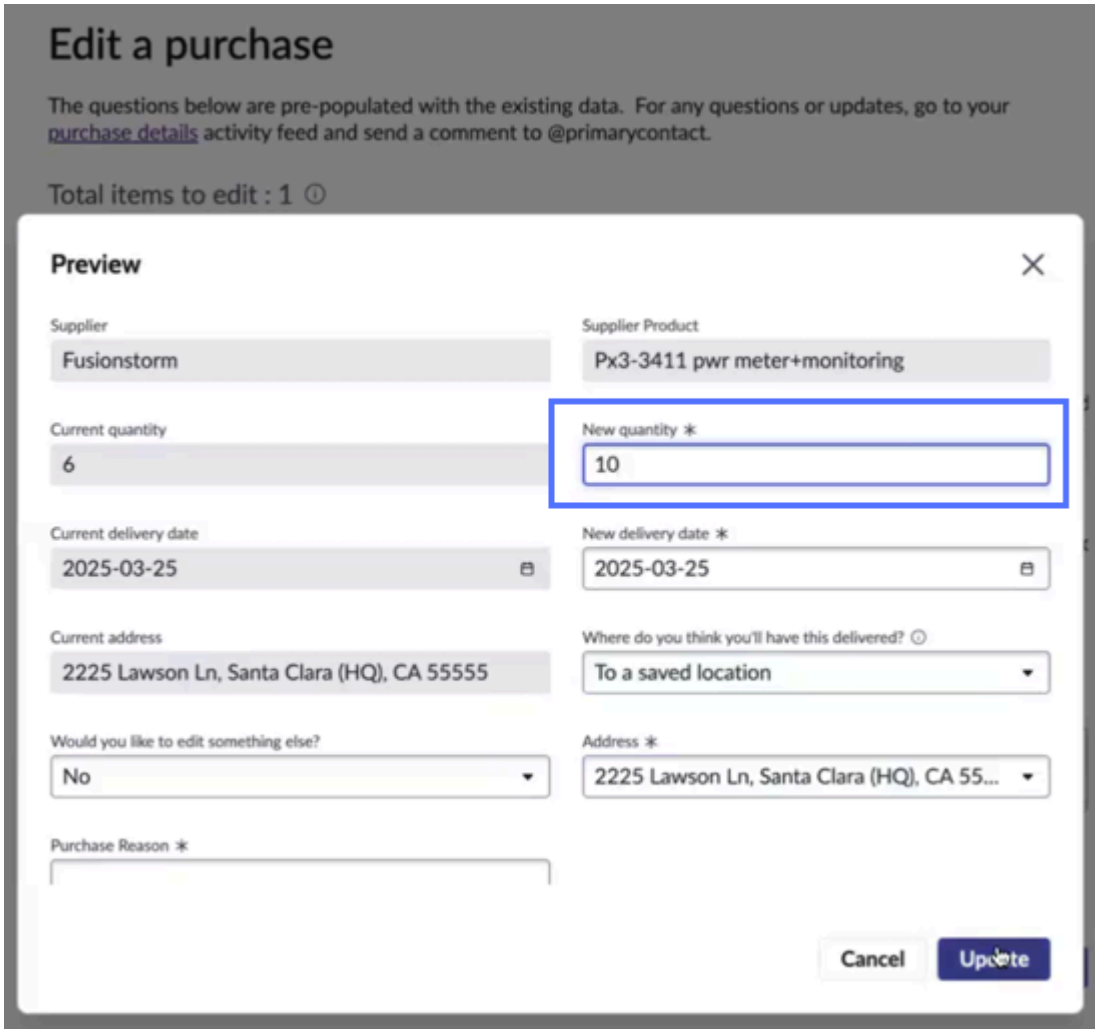
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- Customer Success Cost Center: $276 (20% of $1380)
- Engineering Cost Center: $1104 (80% of $1380)



Now suppose you edit the PR or PO to increase the quantity from 6 to 10 pencils. The total cost amounts to $2300.

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In this case, the total cost is proportionally distributed between both the cost centers based on the original allocation:

- Customer Success Cost Center: $460 (20% of $2300)
- Engineering Cost Center: $1840 (80% of $2300)



Allocation type	Cost owner	Cost center	Employee credit	Allocate by	Allocation amount
Cost Center	Shirley Ross	Customer Succes	(empty)	Percentage	$460.00
Cost Center	Shirley Ross	Engineering	(empty)	Percentage	$1,840.00

The cost allocation remains consistent when modifying purchase quantities in a PR or PO.

For more information, see Cost allocations.

Related topics

Edit a purchase line from a purchase requisition or order

Edit a purchase line from a purchase requisition or order from Employee Center (EC)

Raise a cancel request

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

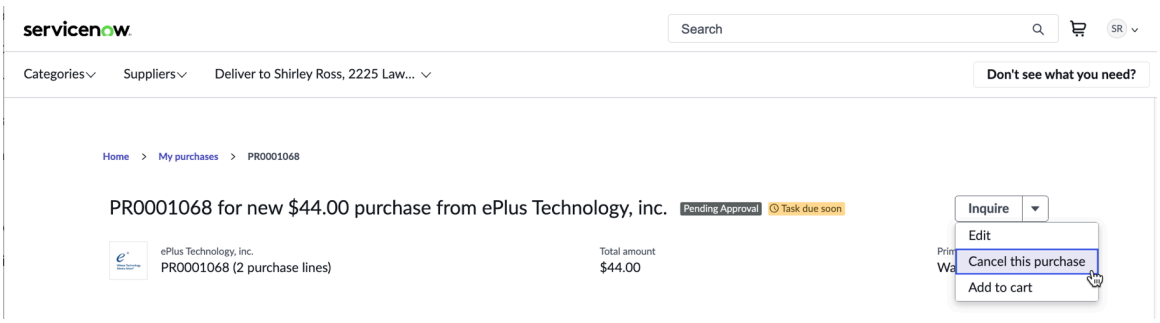
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Before you begin

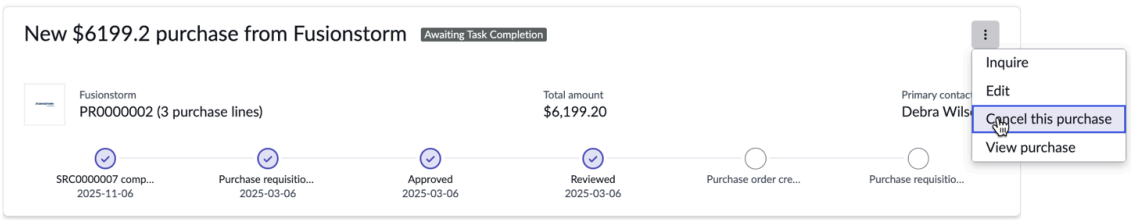
Role required: sn_spend_psd.requestor or shopper

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** from the **Edit** menu or the **More options** menu.

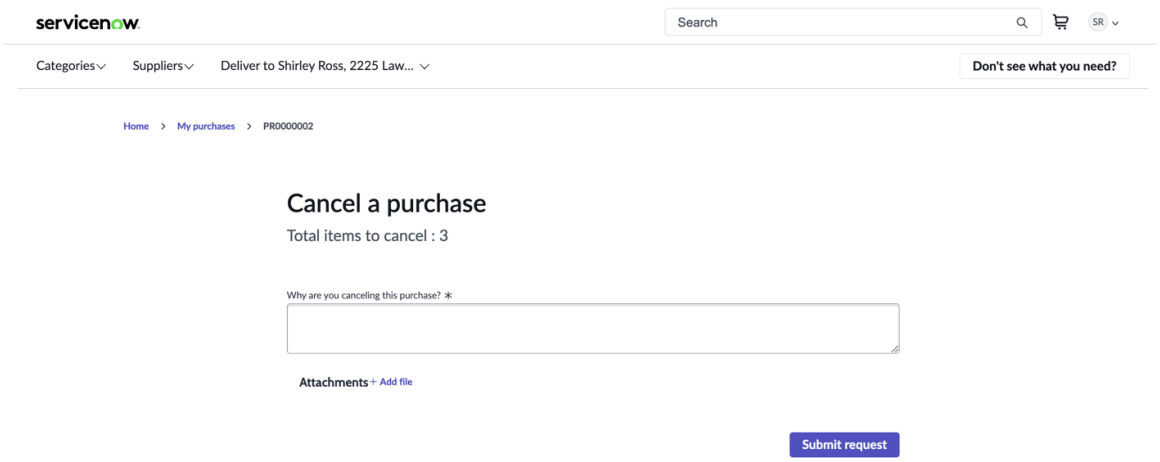


You can also select the **More options** icon on the requisition line and select **Cancel this purchase** to cancel a purchase.



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**.

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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** > **Source-to-Pay Workspace** > **Procurement Cases**, if required.

Related topics
Purchase revision flows

Process Automation Designer flows for playbook

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

Before you begin
Role required: sn_spend_psd.requestor or shopper

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

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

Return a purchase form

Field	Description
Return type	Type of return you want to request. The options are: ○ **Return for a refund** ○ **Return for a replacement**
Business owner	Name of the business owner. This field is auto-populated.
Return scope	Select whether you want to return teh entire purchase or individual items from the purchase. The options are: ○ **Entire purchase** ○ **Individual items**
Purchase order lines	This section is displayed if you select **Individual items** from the **Return scope** field.

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Field	Description
	○ **Purchase order line**: Purchase order line that you want to modify. ○ **Product name**: Product associated with the purchase order lines. ○ **Quantity received**: Quantity of items that you have received. ○ **Quantity returned**: Quantity of items already returned before, if any, is auto-populated. ○ **Quantity to be returned**: Quantity of items to return. This field is displayed only if you selected **Return for a refund** in the **Return type** field. ○ **Quantity to be replaced**: Quantity of items to replace. This field is displayed only if you selected **Return for a replacement** in the **Return type** field.
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.
Reason for return	Reason for returning this purchase.

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

5. Select **Submit Request**.
   A confirmation message screen appears.

Result

Depending on the type of return request, this procedure creates a procurement case of type Return a purchase or Replace a purchase, with the relevant details. Associated request lines and tasks are created using this information.

The fulfiller can approve or reject the return or replacement request. For more information, see the following topics:

- Process a return request in playbook
- Process a replacement request in playbook

What to do next

- Shoppers can review the request details from **Employee Center** > **My Requests**.
- Shoppers can review the request details from **ShoppingHub** > > **My purchases**, accessed from the profile image or from the footer.
- Buyers can track the progress of the procurement case and procurement case line requests from **Source-to-Pay Workspace**.

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Submit an edit receipt request from Shopping Hub

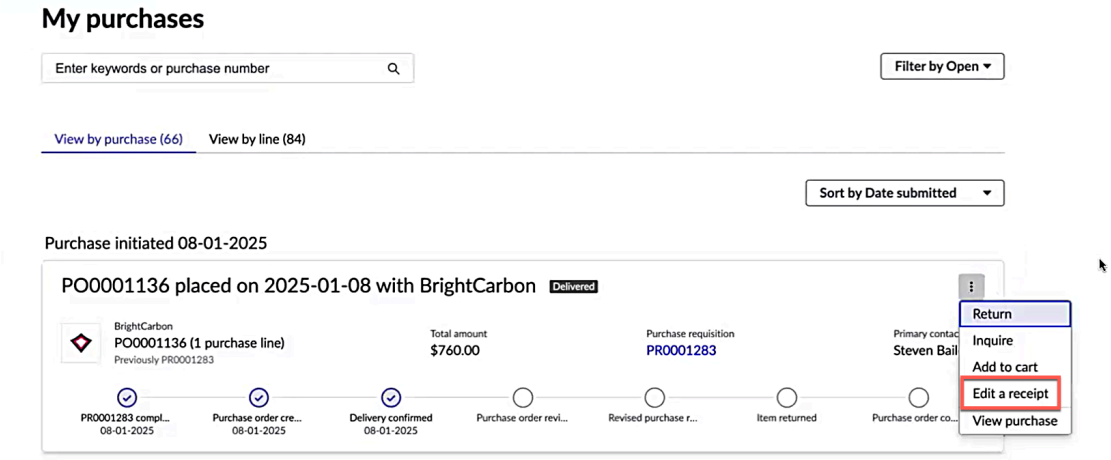
As a shopper, you can revise previously accepted receipts to address any discrepancies, ensuring accurate updates to purchase orders, purchase order lines, and received quantities.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home** > **My purchases**.
   Alternatively, you can return a purchase from **Employee Center** > **Purchase and Expense** > **Purchase Requests** > **Edit a receipt**.
2. Search for and open the purchase order or Purchase order line you want to edit.
3. Select the kebab menu, and then select **Edit a receipt**.



4. On the Edit a request form, fill in the fields.

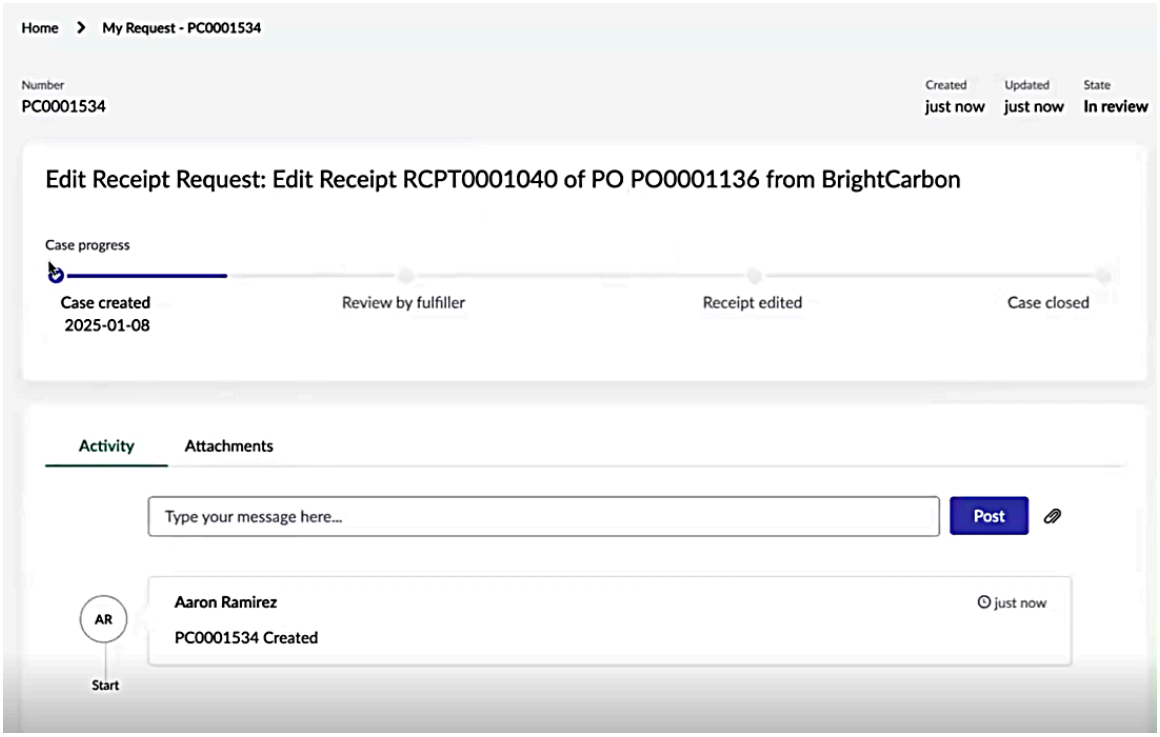
My purchases form

Field	Description
Business owner	User who submitted the purchase request.
Purchase order line	Purchase order line that you want to modify.
Receipt	Receipt that you want to edit.
Quantity received	Number of items you received from that order.
Date received	Date when you received the items.
Reason for edit	Reason for editing the receipt.

5. Select **Submit request**.

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A procurement case of type Edit a receipt is created.



What to do next

- Shoppers can review the request details from **Employee Center** > **My Requests**.
- Shoppers can review the request details from **ShoppingHub** > > **My purchases**, accessed from the profile image or from the footer.
- Buyers can track the progress of the procurement case and procurement case line requests from **Source-to-Pay Workspace**.

Shopper to-dos

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

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

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

You can select a to-do to view the details of the task, and view and upload attachments associated with the to-do. You can also track the updates on a selected to-do by selecting the **Activity** tab. You can also compose a message and tag a person you want to address, with "@<primary contact name>", in the **Comments** field. An instructional message is displayed above the Compose section that dynamically shows who the primary contact is for the associated purchasing task. The specified user receives an email notification.

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

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

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

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

To-do refinement options

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

Filter

You can filter your to-dos by:

- **Open**: This option is **Default**. All tasks with the following conditions:
  - Purchasing tasks that are in the Open state.
  - Sourcing tasks with subtype Ask a question, that are in the Work in Progress state, with sub-state as Answer Pending.
  - Sourcing tasks with subtype Select a Supplier, that are in the Work in Progress state.
  - Approval tasks, for purchase requests or approvals for invoices, that are in the Requested state.
  - Receipt tasks that are in the Open, Shipped, or Partially Complete state.
  - Milestones that are in the Confirmation Required state.
- **Due this week**: All tasks that are due in the next seven days.
- **Overdue**: All tasks that are past their due date.

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Sort

You can sort your to-dos by:

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

Search

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

The following fields are searchable:

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

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

To-do highlights

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

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

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

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

Approve your purchase requisition from 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.

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

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

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

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

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

6. Select **Submit**.

Provide more details on your purchase from 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.

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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.

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.

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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.

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.

Action	Description
Checkout now	Select the quote that works best for you and proceed to checkout. The quick checkout pane is displayed, with the details for your pur chase already filled in. For more information on how to proceed, see Order a product.
Reject all quotes	Reject all the quotes if none of them serve your purpose.

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Action	Description
	Note: When rejecting all quotes, you must provide your justification for rejec tion on the **Reason for rejection** win dow.

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.

Action	Description
Received selected	Confirms receipt of the selected orders. On the **Confirm receipt** window, fill in the fol lowing fields: ○ **Quantity received**: Number of items you re ceived from that order. ○ **Date received**: Date when you received the items.
Received all	Confirms receipt of all the orders. On the **Confirm you received everything** win dow, select the date when you received your ordered items.

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.

Action	Description
Additional comments	Provide your response, if any, and select **Complete**.
Defer completion	Push the milestone to a later date.

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Action	Description
	On the **Defer completion** window, provide your reason for changing the due date, pick a new due date, and select **Submit**. **Note:** Milestones can be received in percentage and amount, but can only be deferred if not complete until they're processed for the full milestone. This is because milestones are parts of the whole, and partials aren't supported.
Cancel milestone	Cancel the milestone altogether. On the **Cancel milestone** window, provide your reason for canceling the milestone, and select **Submit**.

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**.

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.

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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. 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.
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.

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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.
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.

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

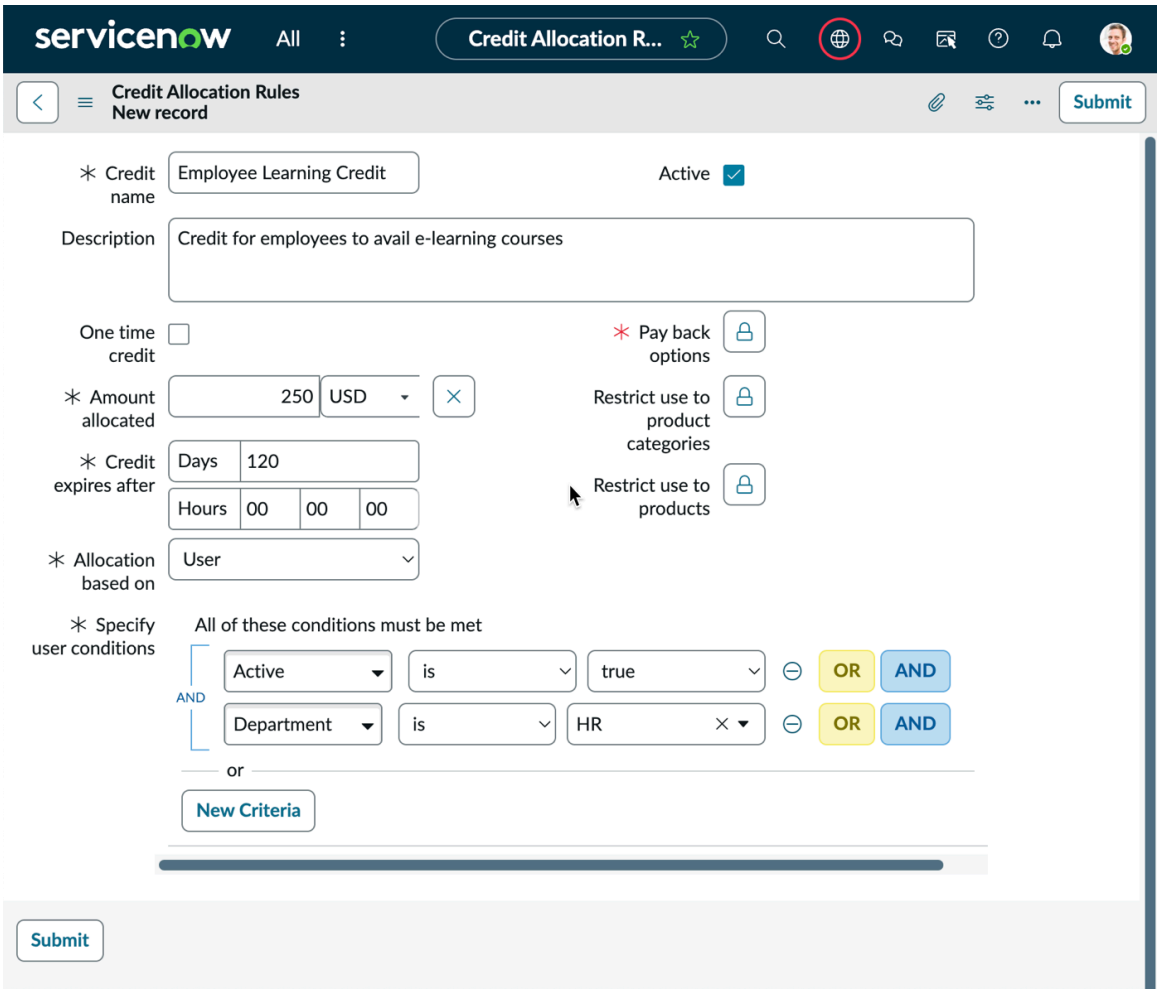
About this task

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

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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 spend categories	Search for and select the spend 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 spend categories**, **Restrict use to product categories**, or **Restrict use to products** fields to create the record.
Restrict use to product categories	Search for and select the product 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 spend categories**, **Restrict use to product 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 spend categories**, **Restrict use to product 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**.

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Shopping controls overridden by credits

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

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

Consider these scenarios:

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

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

Shop with employee credits

Shop products from the various categories in 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.

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3. Navigate to the credit that you want to shop with, and select **Shop this credit**.
4. On the **Filters** form, fill in the fields.

Filters form

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

5. From the search results, select the product you want to shop.
   The product details page is displayed.
6. In the **Purchase by** field, select one of these options.

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

7. Select **Request to buy**.
8. On the quick checkout form, fill in the fields.

Quick checkout form

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.

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

11. Add any supporting documents for this purchase as attachments, if applicable.
12. Select **Submit request**.

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

What to do next

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

Alerts and email notifications from ShoppingHub

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

Alerts

You receive an alert triggered from ShoppingHub when:

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

Email notifications

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

- You submit a purchase request, irrespective of approval requirement (for one or multiple purchase lines)
- 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.

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Note: As an approver, you can approve the purchase from the email itself. For details, see Approval email notification templates.

- An approver requests clarifications on your purchase request
- An approver requests clarifications on your sourcing request
- You respond to clarification requests on your purchase request
- You respond to clarification requests on your sourcing request
- A purchase is manually merged with an existing purchase, irrespective of approval requirement
- A merged purchase is approved, partially approved, or rejected
- You submit a sourcing request
- Your delegate submits a sourcing request
- Your purchase is approved, partially approved, or rejected and canceled
- Your sourcing request is approved, partially approved, or rejected
- You initiate or submit a purchase revision, irrespective of approval requirement
- Your purchase revision is confirmed, approved, rejected, or canceled
- 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

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- 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
- A procurement case state automatically changes to **Awaiting Acceptance**

> **Note:** The requestor gets an email notification with options to accept or reject the case resolution within a set time. The admin can set this time limit by navigating to **All > Finance Common > S2P Custom Configuration > Case resolution acceptance config** and updating the `auto_close_in_days` value to an integer greater than 1 in the **Script** column. To turn off the email notifications, the admin can set the `email_acceptance` value to **False**. The requestor can also respond directly in the Employee Center by clicking **View case details**. For more information on procurement case states and approve request from Employee Center, see Procurement case states and Approve a request from Employee Center.

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

Prioritize 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.

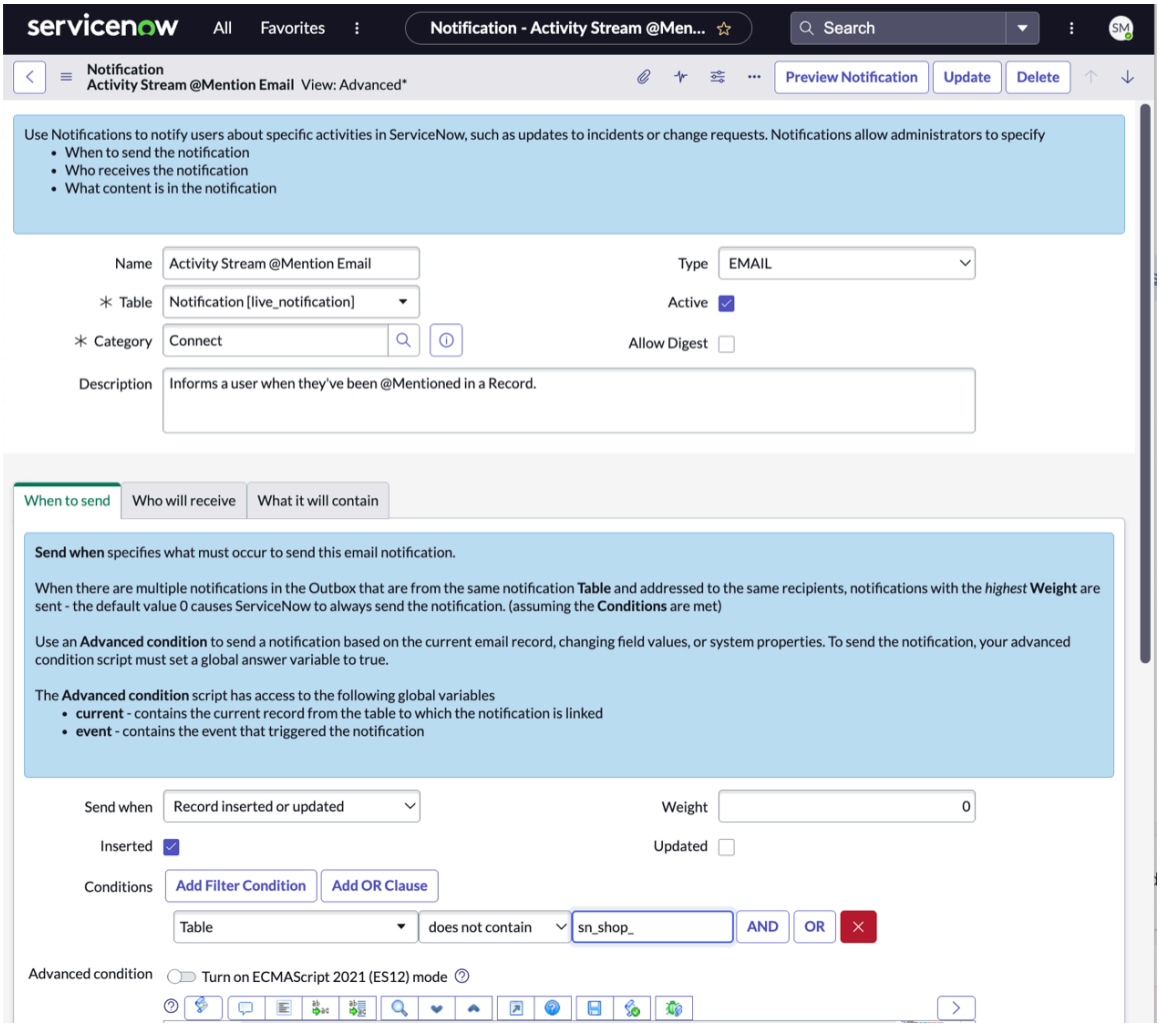
Before you begin

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_"

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5. Save the record.

Delete a saved address

Shoppers can delete saved delivery addresses they no longer need.

Before you begin

Role required: sn_shop.shopper

About this task

When a non-default address is deleted, it is immediately removed from the saved addresses list and a success confirmation appears. If the deleted address is the current default delivery location, you must select a new default before the deletion completes. For more information about address deletion permissions, see Address deletion permissions.

When you delete an address, the following happens:

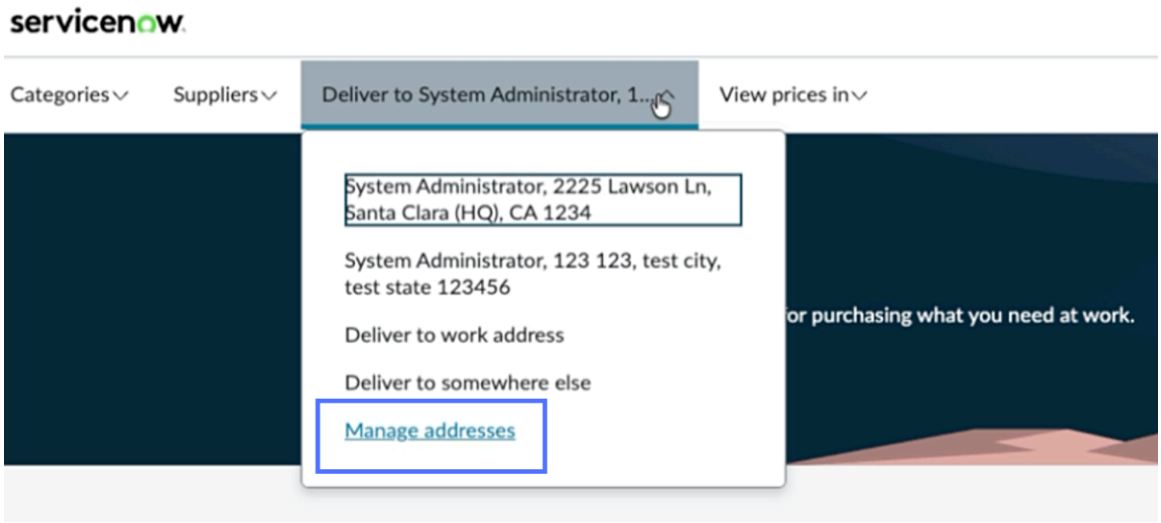
- Single address removal: When you delete a work address you no longer use, a success notification confirms the deletion.
- Bulk deletion: You can remove multiple addresses at once using the Manage saved addresses modal. You cannot delete all addresses at once and must keep at least one saved address.
- Deleted addresses do not appear: Deleted addresses are hidden from the delivery location picker at checkout.

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- Work address directory is unaffected: When adding a new work address from the org directory, previously deleted addresses are visible and can be re-added to the saved list.
- Re-addition restores functionality: You can re-add a previously deleted address from the work address picker to restore it to your saved list.

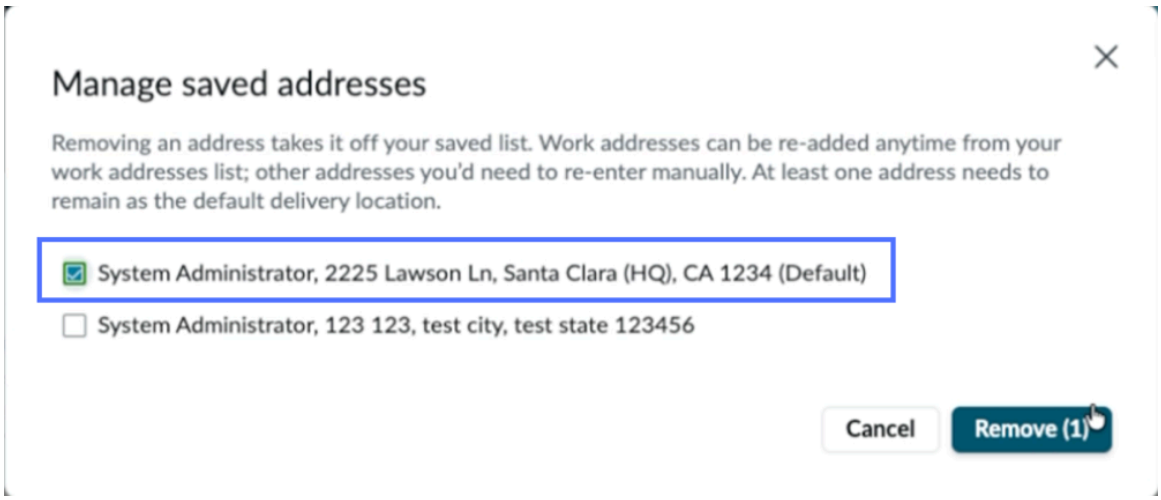
Procedure

1. From the Shopping Hub home page, select the **Deliver to** drop-down list.
2. Select the **Manage addresses** link.



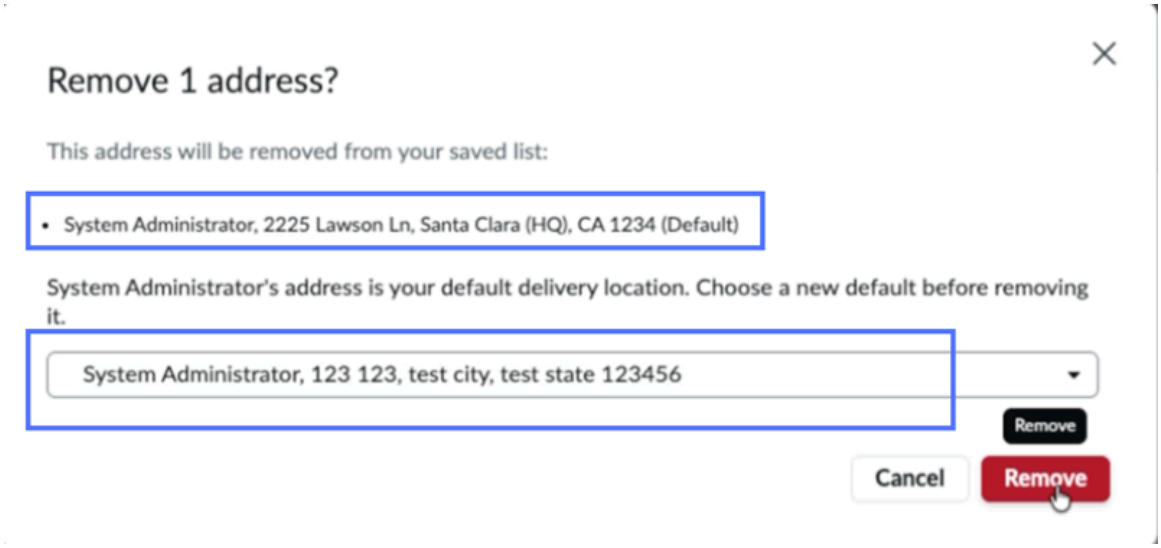
The Manage saved addresses modal opens, displaying all your saved delivery locations.

3. In the modal, select the box beside the address you want to delete.

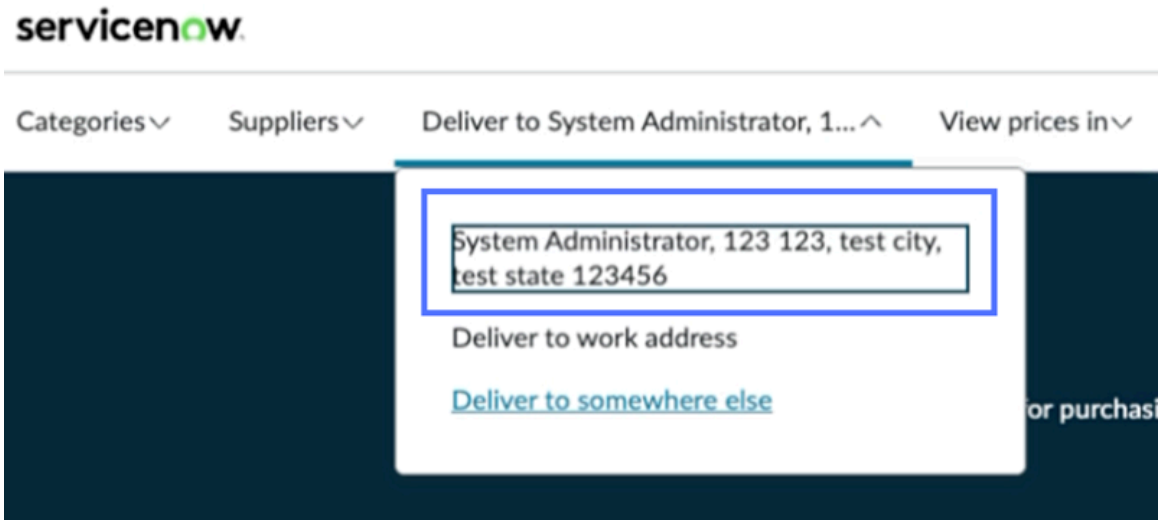


4. Select **Remove** to confirm the deletion.
   - If the address is not the default: The address is immediately removed from the list. A success toast notification confirms the deletion.
   - If the address is the default: A secondary modal appears asking you to select a new default delivery location before proceeding.
5. If prompted, select a replacement default address and then select **Remove** again.

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The old default address is deleted, and the newly selected address becomes your default delivery location.



Result
The deleted address is removed from your saved addresses list. The address record is marked as deleted in the system but is not permanently removed, enabling audit and potential restoration if needed.

If you attempt to re-add the deleted address from the work address picker, it will reappear in your saved list with a fresh record.

- If the deletion fails, the modal closes and an error toast notification appears. The address remains in your saved list. Try again or contact your administrator for assistance.
- If the **Remove** button is disabled, you have selected all saved addresses. Deselect one address to retain it as your default delivery location, then try again.
- If the **Manage addresses** link is not visible, you have only one saved address. You must always have at least one default delivery location and cannot delete it.

Using Shopping Hub Mobile

The ServiceNow Shopping Hub Mobile app enables you to engage with procurement organizations from a mobile device.

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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

Install Sourcing and Procurement Operations

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.

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

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Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the approval to-do you want to work with.
4. View details of the approval request, such as requester name, total amount or budget requiring approval, and request ID at the header level.
   At the line level, you can view the details of the requested items, such as product, approval amount, approval status, unit, price, quantity, total line amount, line number, reason for purchase, product type, delivery location, expected delivery date, and so on. You can also filter the purchase requisition lines by their approval status, and view associated activities and attachments in separate tabs therein.
5. On the **To-do** tab, select **Pending approval**.
6. Do any of the following actions.

Action	Description
Approve	Swipe left on the line item, and select **Approve** to approve it.
Reject	Swipe left on the line item, and select **Reject** to reject it.
Approve all	Tap on the Actions icon, and select **Approve all** to approve the entire purchase.
Reject all	Tap on the Actions icon, and select **Reject all** to reject the entire purchase.

   You can view your approved and rejected to-dos in the **To-do** tab, listed after your pending approvals. You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab.

   Note: When rejecting a line item or an entire purchase, you must provide your justification for rejection in the **Response** field.

7. Tap the Next icon.

Provide more details on your purchase from your mobile device

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

Before you begin

A procurement specialist can request for more information about a sourcing request by assigning a to-do. When this more information needed request is assigned to you, it is displayed on the Now Mobile **My Tasks** tab, in addition to the 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.

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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**.
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.

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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.

Action	Description
Reject	Swipe left on the line item, and select **Reject** to reject the purchase line.
Request to buy	Swipe left on the line item, and select **Re quest to buy** to proceed with the supplier and perform a quick checkout.

Note: When rejecting a quote, you must provide your justification in the **Reason for rejection** field.

6. Tap the Next icon.

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Confirm receipt of your order from your mobile device

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

Before you begin

To provide confirmation of receipt of your orders, you should have received a part of your order at least, if not the complete order.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the receipt to-do you want to work with.
4. On the **To-do** tab, select **Pending confirmation**.
5. Do one of these actions.

Action	Description
Received	Swipe left on the line item, and select **Re ceived** to confirm receipt of the selected or ders. On the **Confirm receipt** screen, fill in the fol lowing fields: ○ **Quantity received**: Number of items you re ceived from that order. ○ **Date received**: Date when you received the items.
Received (Details screen)	Tap on the line item to view the Details screen with the list of all the items pending deliver ies. Select **Received** to confirm receipt of all the orders. On the **Confirm receipt** screen, fill in the fol lowing fields: ○ **Quantity received**: Number of items you re ceived from that order. ○ **Date received**: Date when you received the items.

You can view your received deliveries in the **To-do** tab, listed after your pending confirmation tasks. You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab.

6. Tap the Next icon.

View shipment details of your order from your mobile device

View the current status of your ordered items, along with the tracking number and carrier name, in your receipt to-dos, from your mobile application.

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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.

Role required: sn_shop.shopper

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

Procedure
1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the receipt to-do you want to work with.
4. On the **To-do** tab, select **Shipment details**.
   Details of the dispatched items, including tracking number, carrier name, and status, are displayed.

Confirm meeting a milestone for your service from your mobile device

Provide confirmation on whether the supplier has met a milestone for a service you had ordered, from your mobile application, so that payment can be processed to the supplier for that milestone. If a milestone has not been met by the due date, you can choose to push the due date to a later date.

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

Role required: sn_shop.shopper

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

Procedure
1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the to-do you want to work with.
4. On the **To-do** tab, do one of these actions.

Action	Description
Confirm milestone	Select **Confirm milestone** and provide your response, if any, in the **Additional comments** field.
Defer completion	Tap on the Actions icon, and select **Defer completion** to push the milestone to a later date.

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Action	Description
	On the **Defer completion** screen, pick a new completion date and provide your reason for changing the date.
Cancel milestone	Tap on the Actions icon, and select **Cancel milestone** to cancel the milestone altogether. On the **Cancel milestone** screen, provide your reason for canceling the milestone.

You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab. Here, you also have the option to view the entire purchase if you so desire.

5. Tap the Next icon.

Review invoice acknowledgment task from your mobile device

Review invoices that require acknowledgment from your mobile application. Invoice acknowledgments are sent to the recipients of the purchases, and each line associated with an invoice can be marked as correct or incorrect. Your action on these to-dos moves the invoices to their respective workflows.

Before you begin

When you are assigned as the recipient of an order that requires invoice acknowledgment, and that invoice is sent to you for acknowledgment by the procurement team, an invoice acknowledgment task is displayed on your Now Mobile **My Tasks** tab, in addition to the 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**.
5. Do any of these actions.

Action	Description
Mark all lines correct	Marks all the invoice lines as correct and moves them to the Invoice Confirmed state.
Review invoice lines	Displays the details of all the invoice lines for your review.
Mark as correct	Swipe left on an invoice line and select **Mark as correct** to move it to the Confirmed state.
Mark as incorrect	Swipe left on an invoice line and select **Mark as incorrect** to move it to the Rejected state.

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Action	Description
Mark all lines correct	Tap on the Actions icon and select **Mark all lines correct** to move all the invoice lines to the Invoice Confirmed state.
Mark all lines incorrect	Tap on the Actions icon and select **Mark all lines incorrect** to move all the invoice lines to the Rejected state.
Approve	Tap on the invoice line and select **Approve** to move it to the Confirmed state.
Mark incorrect	Tap on the invoice line and select **Mark incorrect** to move it to the Rejected state.

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.

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4. Do one of these actions.

Action	Description
View your purchase details	On the **Purchase** tab, view the details of your purchase, such as quantity, recipient, deliv ery location, start date, end date, subtotal, tax, purchase reason, and so on.
View more information on your purchase	Select the **More Info** tab to view more informa tion associated to your purchase, such as ad ditional quotes, receipts, prepayments, and other related lists.
Revise purchase	Tap the Actions icon to revise your purchase. On the **Revise purchase** screen, enter the re vised quantity and delivery location, and tap the Next icon.

Related topics

- Shopping Hub Mobile
- My purchases on Shopping Hub
- Display My Purchases on your mobile instance

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

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** > **Source-to-Pay 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.

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5. Select **Create Case**.
6. On the form, fill in the fields.

Procurement Case

Field	Description
Number	System-generated unique identifier for the case.
Created	Date and time when the case was opened.
Case type	Type of case based on the requirement. Available options: ○ Budget review ○ Contract review ○ Delivery address review ○ Due Diligence Case ○ General procurement case ○ GL coding review ○ Send NDA for signature
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	Sourcing 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.

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Field	Description
	Note: This field is displayed only if a related sourcing request, negotiation, or sourcing 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 sourcing 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.
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**.

Related topics

Base system procurement case type reference

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.

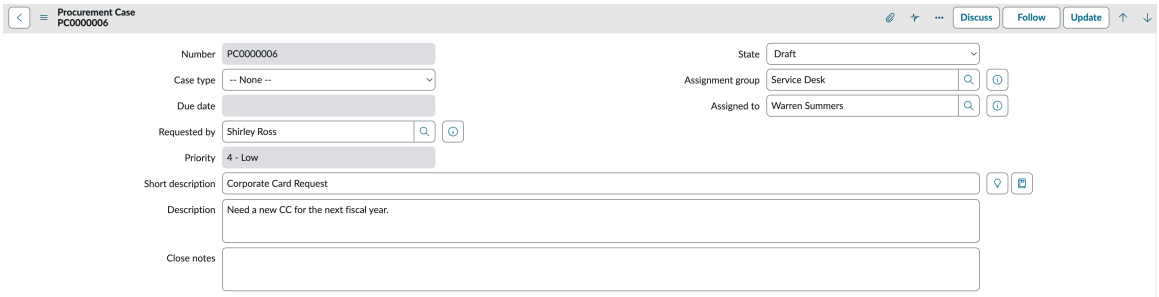
Before you begin

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.

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Field	Description
Number	System-generated unique identifier for the request.
Created	Creation date of the request.
Request type	Type of the request, such as **Corporate Card Request**.
Request by	Owner of the request.
State	Status of the request.
Priority	Urgency of the request.
Assignment group	Group that can fulfill the request.
Assignment to	Person assigned to fulfill the request.
Short description	Short description of the request.
Purchase modification reason	Reason for purchase modification.
Description	Detailed description of the request.

4. Select **Submit**.

Note: You can also submit procurement cases from the Service Catalog.

What to do next

- Review and edit your request details.
- Track the progress of your request by monitoring the request fulfillment with the procurement organization.

Create a 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

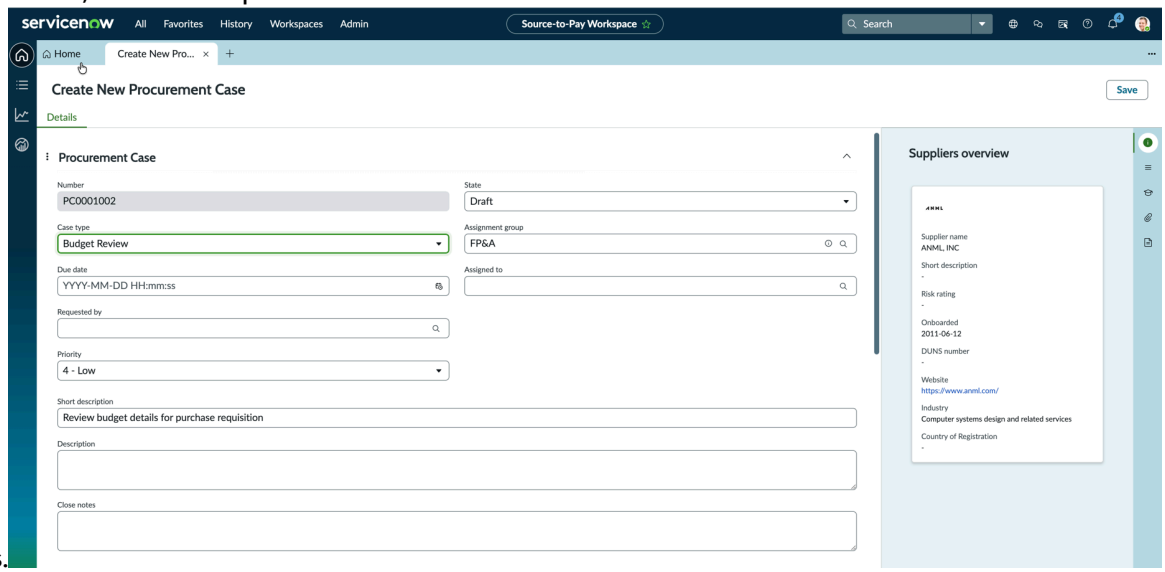
Before you begin

Role required: sn_shop.procurement_specialist

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Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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 supplier case

As a procurement specialist, with an additional supplier role of sn_slm.manager, create a supplier case from the list view of Source-to-Pay Workspace to address your supplier-related business needs.

https://player.vimeo.com/video/1056096764?h=c4bc92591c&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_shop.procurement_specialist and sn_slm.manager

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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 **Case type** 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.

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Supplier Case

Field	Description
Number	System-generated unique identifier for the case.
Requested by	Person who requested for the case.
Case type	Type of case based on the requirement. The case type options are different for procurement cases and supplier cases.
Supplier	Supplier associated with the case.
Opened by	Person who opened the case.
Opened	Date and time when the case was opened.
State	Current state the case is in.
Stage	Not applicable.
Priority	Urgency of the case.
Assignment group	Group to which the case is assigned to.
Assigned to	Person within the assignment group to whom the case is assigned to.
Parent	Parent, if any, from which this case has been created, typically for reference purposes.
Due date	Date and time by when the case is expected to be resolved.
Short description	Brief description of the case.
Description	Detailed description of the case.

7. Select **Save**.

Create a 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** > **Source-to-Pay 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.

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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.

Procurement case task form

Field	Description
Number	System-generated unique identifier for the task.
Created	Creation date of the task.
Task type	Type of the task to fulfill the request.
Sub type	Subtype of the task to fulfill the request.
Request	Associated request for the task.
State	Status of the task.
Assignment group	Group that can fulfill the task.
Assignment to	Person assigned to complete the task.
Due date	Expected date of completion for the task.
Short description	Short description of the task.
Description	Detailed description of the tasks.

10. Select **Submit**.
    You can create multiple tasks to fulfill the procurement case. All tasks in Open state are displayed on the **Open tasks** pane of the task tab. You can access the tasks directly from this pane and perform the necessary actions.

Create a 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.

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6. On the **Create a new case or task** dialog box, select **Create procurement task** in the **What would you like to create?** list.
7. Select **Create**.
8. On the form, fill in the fields.

Procurement Task

Field	Description
Number	System-generated unique identifier for the task.
Task type	Type of task based on the requirement.
Select action type for task	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.

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Field	Description
	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	
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.

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Add a sourcing request to a sourcing event

You can manage multi-supplier and multi-product negotiations by mapping similar sourcing requests and related negotiations to a sourcing event.

Before you begin

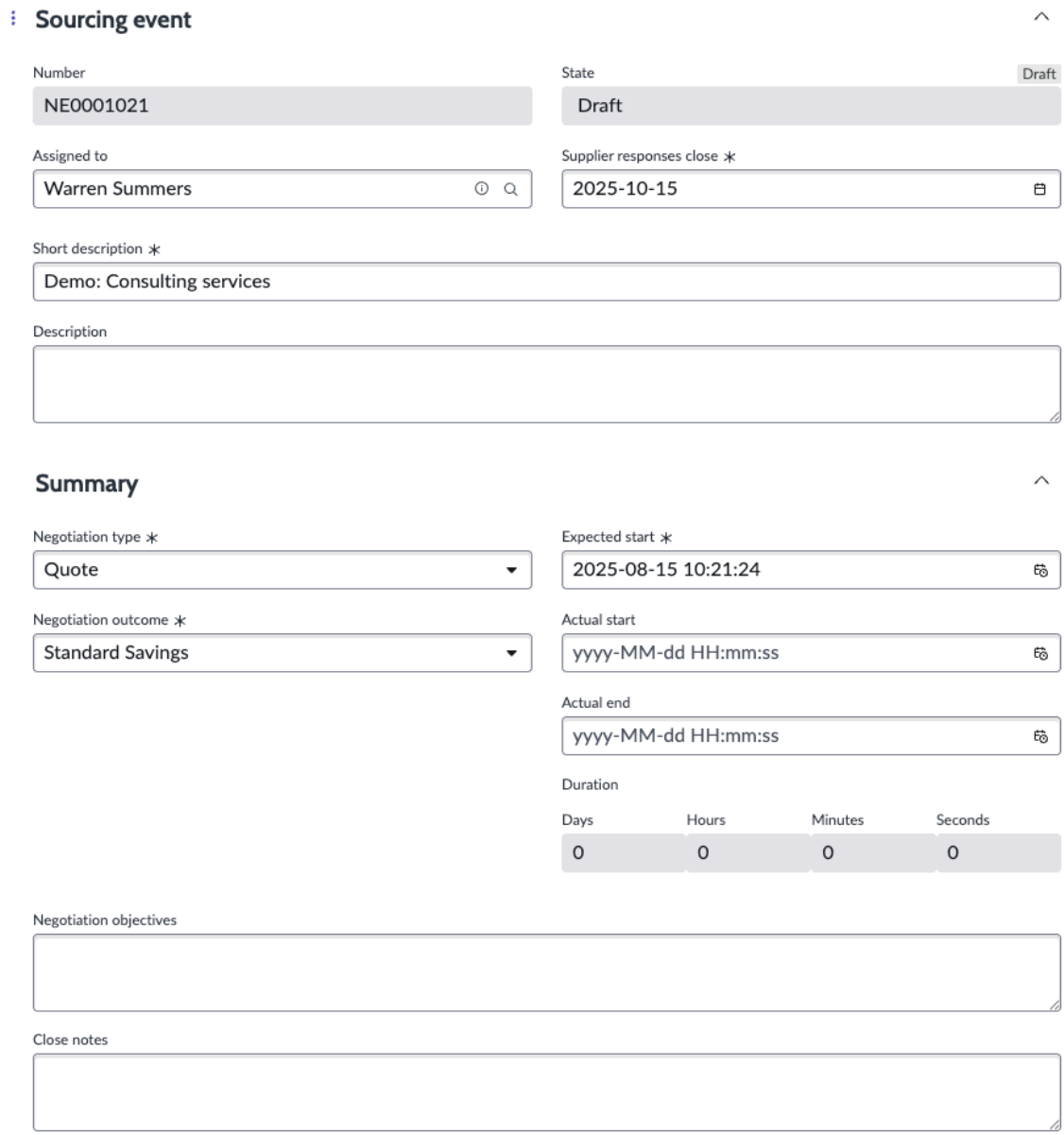
Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay Workspace**.
2. On the list page, navigate to **All work** > **Sourcing Requests**.
3. Select the sourcing request that you plan to add to a sourcing event.
4. Select **Add to sourcing event**.
5. In the Add to sourcing event dialog box, select whether you would like to add the sourcing request to an existing or new sourcing event.

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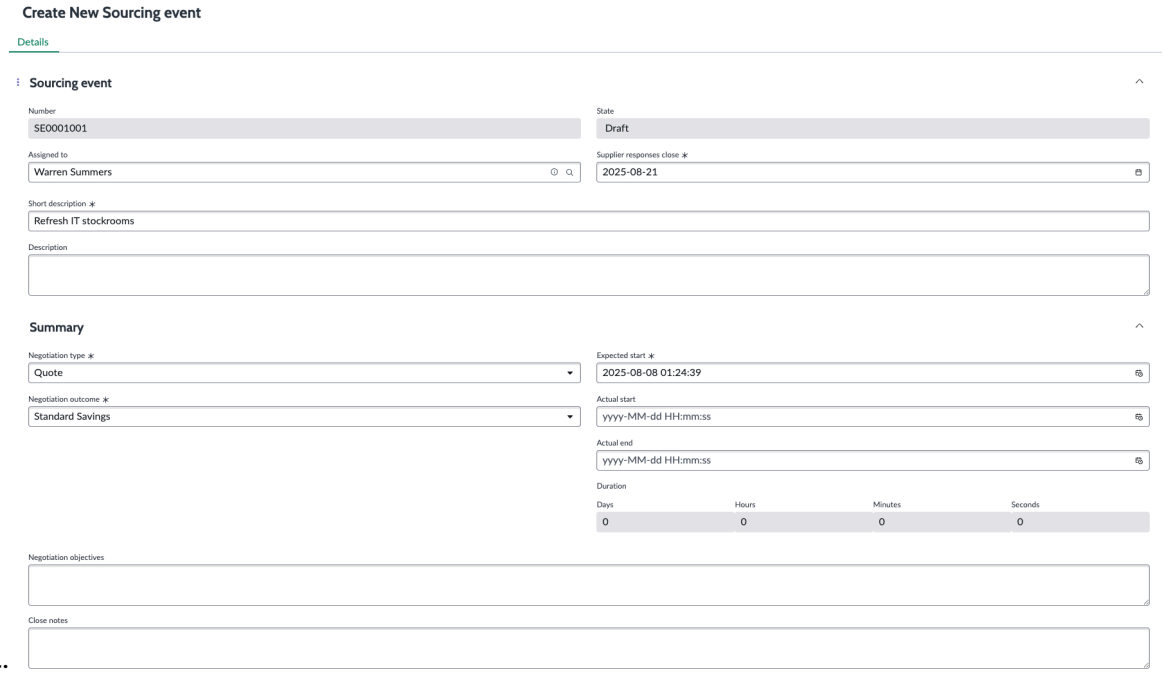
- If adding to an existing sourcing event, select the sourcing event from the **Sourcing events** list. The **Supplier response close** field is auto-populated with the supplier response close date specified in the existing sourcing event that you're adding the sourcing request



to.

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- If adding to a new sourcing



event:

a. Enter a short description for the sourcing 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 sourcing 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 sourcing event, the sourcing request also reflects this updated date.

> **Note:** When adding multiple sourcing requests to a new sourcing event, the furthest date among those requests is used to populate the **Supplier response close** field.

6. Select **Add**.

Result

A new sourcing event is created, which is attached to the selected sourcing request.

What to do next

View an overview of the sourcing 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 sourcing 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 sourcing event as well. For more information, see Work on a sourcing event.

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In compliance with fair competition laws, qualify all your suppliers in that sourcing event before you start negotiating with any of them. For more information, see Supplier qualification.

Work on a sourcing event

You can work on a sourcing 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 sourcing event before you start negotiating with them. You can add additional relevant sourcing requests and qualified suppliers to the ongoing sourcing 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** > **Source-to-Pay Workspace**.
2. On the list page, navigate to **Review needed** > **Sourcing event: ready to negotiate**.
3. Select and open the sourcing event that you plan to work on.
4. Select **Start negotiating**.
   The sourcing 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 sourcing event.
6. **Optional:** Select **Add suppliers** if you want to add more suppliers to this sourcing 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 sourcing event and all its associated negotiations, sourcing requests, and purchase lines to the Requires Decision state.
9. Do one of these actions.

Action	Description
Save	Saves the details of the sourcing event for fur ther action.
Cancel	Cancels the sourcing event and moves all its negotiations and associated sourcing re quests and purchase lines to the Closed Can celled state. This sourcing event is no longer considered for the awarding process.
Award single supplier	Opens the **Select a supplier to award** dialog box, where you can select one of the suppli ers from the list and select **OK** to award the supplier. The awarded negotiation moves to the Closed Decided state while all the others move to Closed Rejected. The purchase lines for the awarded negotiation are automatically converted to purchase requisitions.

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Action	Description
Award multiple suppliers	Opens the **Award suppliers** tab, where you can select one or more suppliers from the list and select **Review selection** to award the sup pliers. The awarded negotiations move to the Closed Decided state while the others move to Closed Rejected. The purchase lines for the awarded negotiation are automatically converted to purchase requisitions. For information on more options that are avail able to you on this tab, see Award multiple suppliers from a sourcing event.
Reject bids	Opens the **Reject all bids?** dialog box, where you must enter your reason for rejection to reject all the bids. The sourcing event and all its negotiations and associated sourcing requests and purchase lines move to the Closed Rejected state.

10. Select **View purchase requisitions** from the sourcing event or the awarded negotiation to view the details of the newly created purchase requisitions.

Award multiple suppliers from a sourcing event

When negotiations are complete for a sourcing event, you can award one or multiple suppliers from the sourcing 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 sourcing 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** > **Sourcing Events**.
3. Select and open the sourcing 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.

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- 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 sourcing event is moved to Closed Complete, with the individual negotiations under it moved to Closed Decided or Closed Rejected based on your selection. The awarded sourcing requests are moved to Closed Complete, with purchase requisitions automatically created for the purchase lines. All the other sourcing requests are moved to the Closed Rejected state.

Create a knowledge base article about procurement

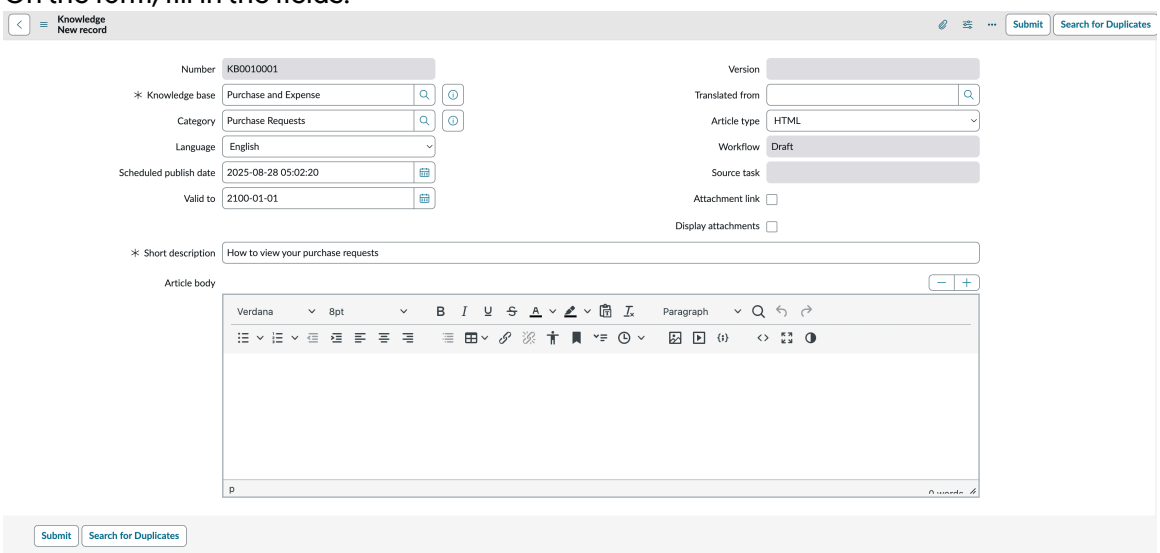
Create a knowledge base article about procurement so that you can share procurement information and policies with your employees and procurement team.

Before you begin

Role required: sn_spend_psd.agent, sn_spend_psd.psd_admin

Procedure

1. Navigate to **All** > **Procurement Case Management** > **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 procurement policy. Use the category picker to select an existing category or subcategory. You can create a category or subcategory to suit your requirements.
Valid to	Validity of the article.
Article type	Type of article such as HTML.
Workflow	Status of the article.
Source Task	Name of the article source.
Attachment link	Link to attachments.
Display attachments	Display of attachments in the article. When you do not select this option, the article does not display the attachments.
Short description	Short description of the article.
Article body	Detailed description of the article.

4. **Optional:** To check if any duplicate articles are available with similar short descriptions, select **Search for Duplicates**.
5. Do one of these actions.

Action	Description
Submit	To submit an article for review, select **Submit**.
Save	To save an article, from the Additional actions menu, select **Save**.

What to do next

- View your submitted articles by navigating to **Knowledge** > **My Knowledge Articles**
- Track the progress of your article from **My Knowledge Articles**.
- Manage the article workflows, such as reviewing, publishing, updating, or retiring the article.
- Monitor the performance metrics of your article by navigating to **Procurement Case Management** > **PSM Dashboards**.

Working with SPO 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.

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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.agent

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** > **Source-to-Pay 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.

Stages in edit a purchase order 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.
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.

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Stage	Activity	Activity Details
		○ **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**. 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.

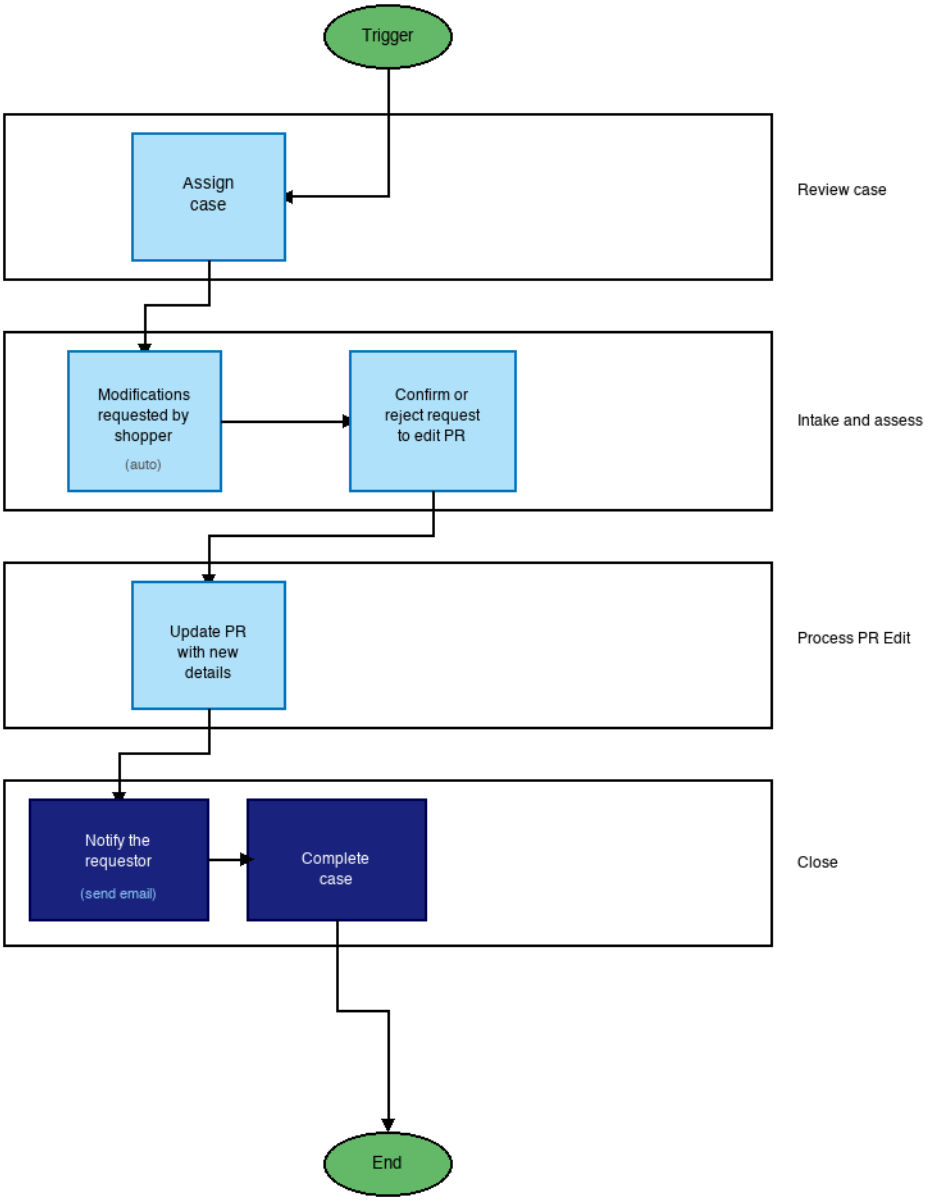
Before you begin

Role required: sn_spend_psd.psd_admin, agents, fulfillers

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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** > **Source-to-Pay 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.

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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.

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**.

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Stage	Activity	Activity Details
		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.

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.

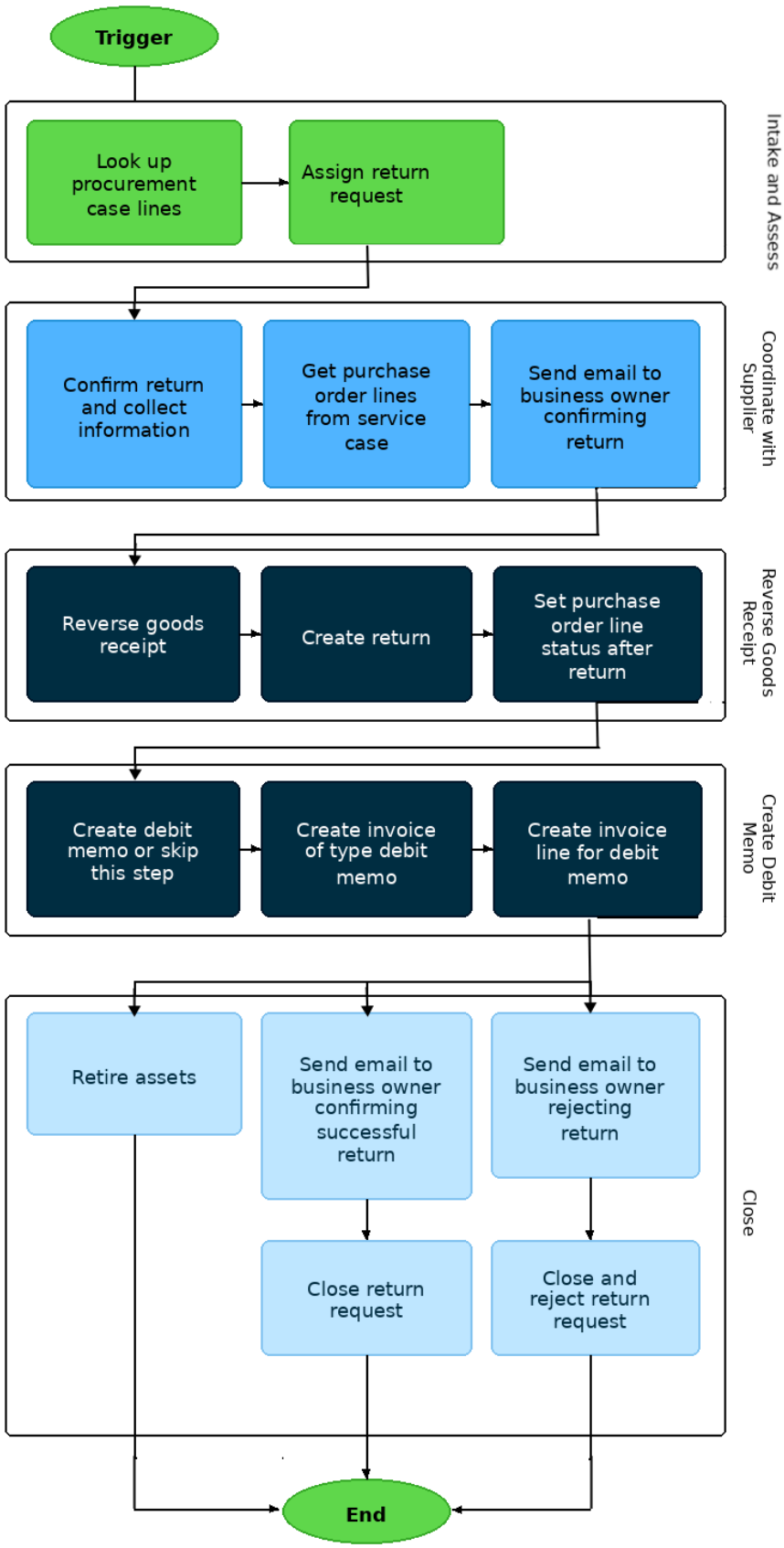
Before you begin

Role required: sn_spend_psd.psd_admin, agents, fulfillers

About this task

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Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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.

Stages in return a purchase 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.
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

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Stage	Activity	Activity Details
		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.
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.

Process a replacement request in playbook

Use the procurement playbook to approve or reject replacement requests.

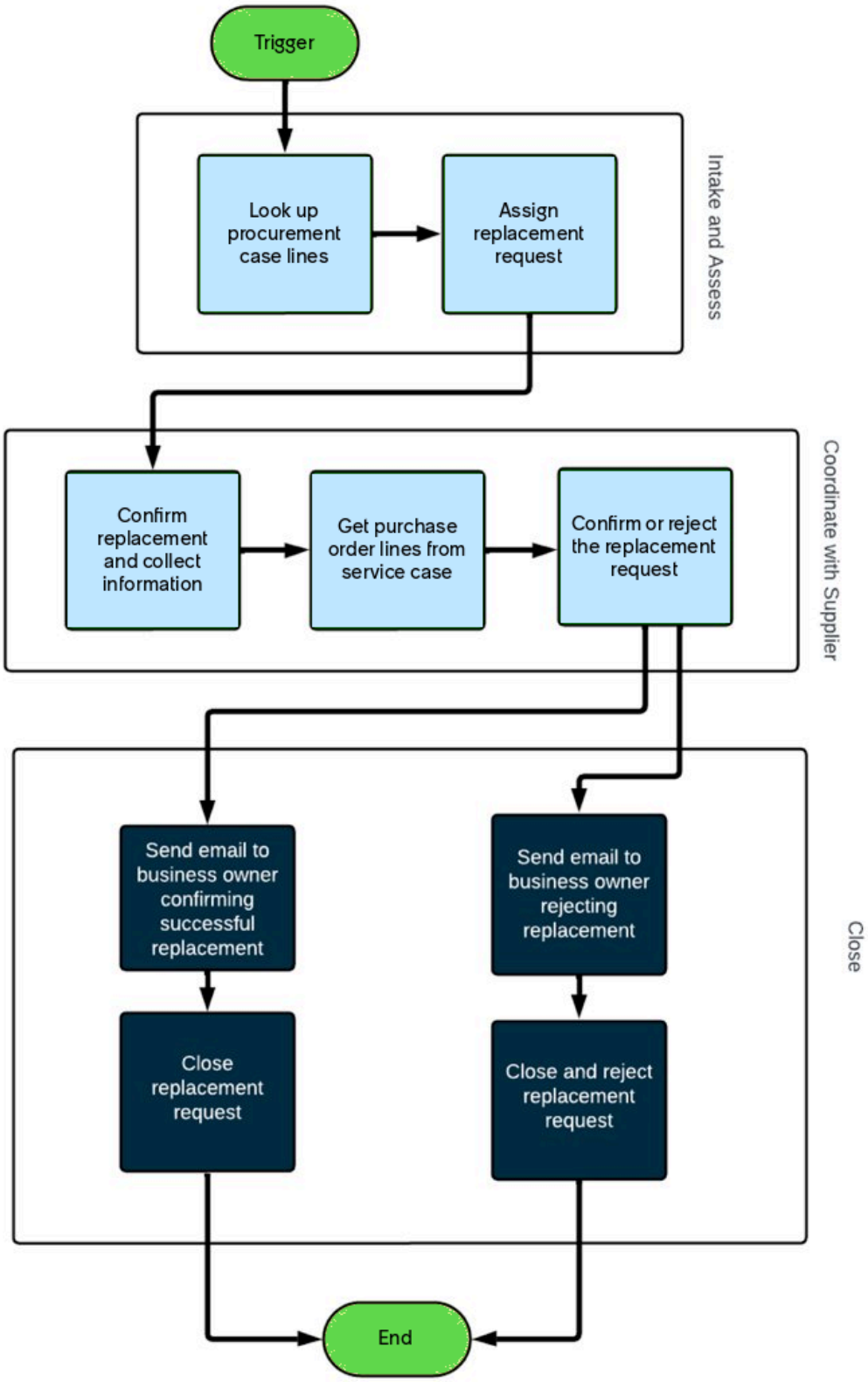
Before you begin

Role required: sn_spend_psd.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** > **Source-to-Pay Workspace**.
2. Select the List icon ( ) and select **All work** > **Cases**.

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3. Select the Replace a purchase case from the list for further processing.
4. Complete the steps in the various stages and activities of the Replace a purchase playbook.

Stages in replace a purchase 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.
Intake and Assess	Lookup procurement case lines	Look up procurement case line associated with this replacement request for use later in the process.
	Assign replacement request	Replacement request is automatically assigned to the buyer assigned to the original purchase.
Coordinate with Supplier	Confirm replacement and collect information	Contact the supplier, confirm the replacement, and collect the necessary information. Select to verify and process the information about the request. ○ **Confirm**: After you verify that replacement 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 replacement request has been initiated. ○ **Reject**: When you reject the replacement 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 replacement request has been rejected.
	Send business owner email confirming replacement acceptance	Sends the business owner confirmation that after reviewing the replacement request and coordinating with supplier, the replacement is feasible.
Close case	Notify the requestor	Sends the business owner confirmation that their replacement has been processed successfully.
	Complete case	Use this activity to add work notes and close the case. Do the following:

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Stage	Activity	Activity Details
		○ 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.

Process an edit receipt request in playbook

You can revise previously approved receipts to correct any discrepancies, ensuring the delivery receipt accurately reflects the quantities received for a specific purchase order.

Before you begin

Role required: sn_spend_psd.agent

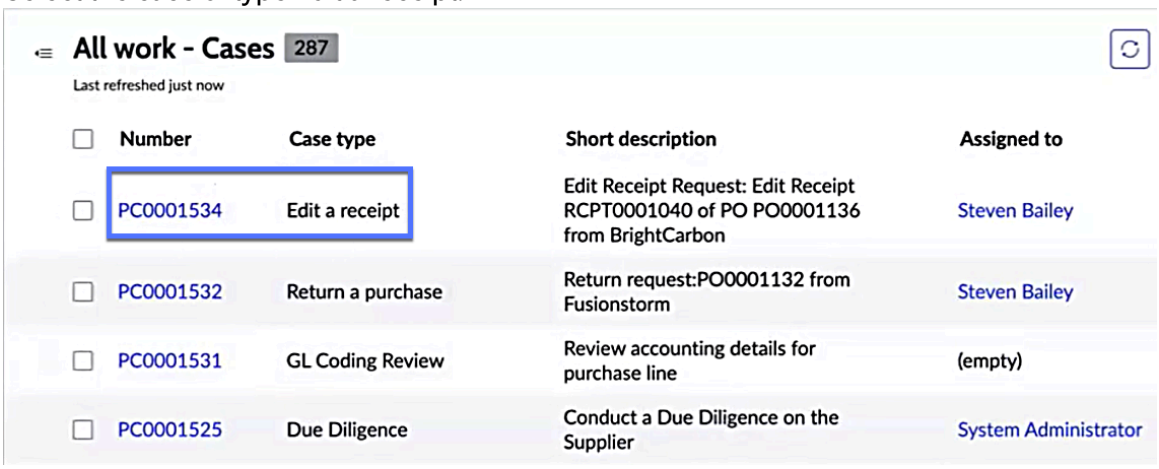
About this task

As a fulfiller, you can review the details of the Edit Receipt request and choose to either confirm or reject it.

Note: This task is not required if the `sn_spend_cp.enable_automated_edit_receipt_flow` system property is enabled. For more information, see Components installed with Sourcing and Procurement Operations.

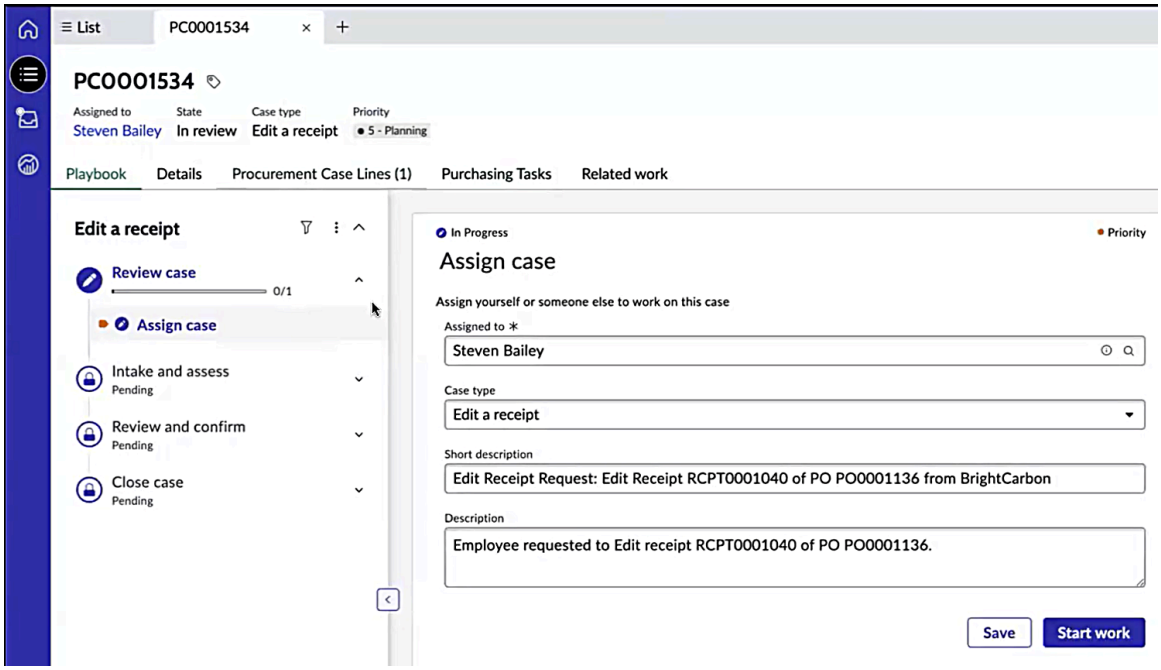
Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay Workspace**.
2. Select the List icon ( ) and select **All work** > **Cases**.
3. Select the case of type Edit a receipt.



4. Complete the steps in the various stages and activities of the Edit a receipt playbook.

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Playbook receipt stages

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 **Case type:** field, leave the default value as-is. ○ In the **Short description** field, add a brief description for the case. ○ In the **Description** field, add a detailed 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	Review the changes requested by the shopper on the delivery receipt.
Review and confirm	Confirm edit	Review this request to edit the delivery receipt and confirm or reject whether it can be processed. Select one of the following actions. ○ **Confirm**: When you confirm, the procurement case moves to Work in progress state. ○ **Reject**: When you reject, the procurement case moves to Closed Rejected state.

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Stage	Activity	Activity Details
	Edit delivery receipt	Updates the delivery receipt with the changes requested by the shopper
	Update purchase order line	Updates the purchase order line with the quantity of items received, as specified by the shopper.
Close case	Notify the requester	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.

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.

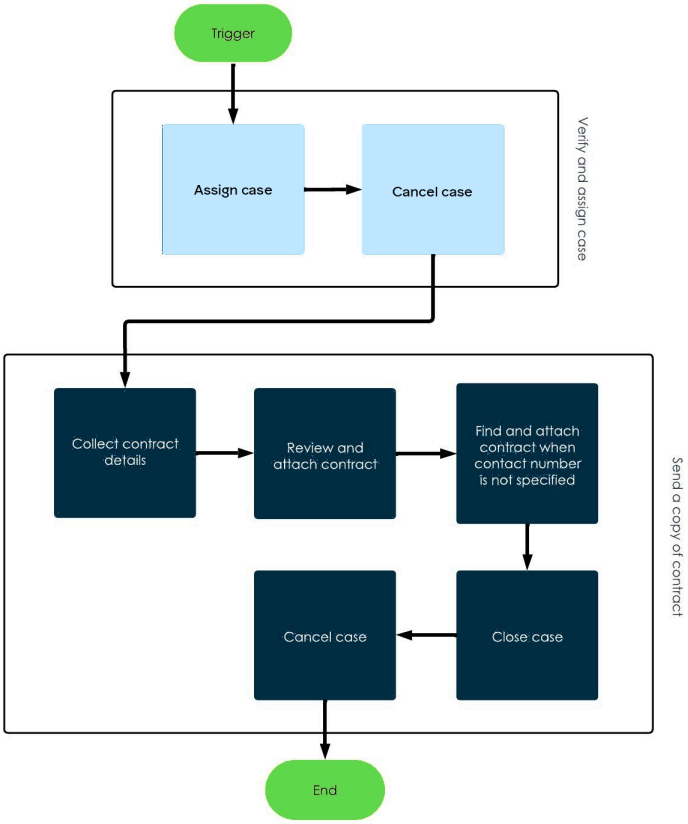
Fulfill request for copy of contract in playbook

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** > **Source-to-Pay 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.

Stages 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 [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** > **Source-to-Pay Workspace**.
4. Select the list icon and select **All team work** > **Cases**.
5. Select **New**.
6. In the Create a new case dialog box, select **Send NDA for Signature**.
7. Select **Create Case**.

   Note: During a procurement request, when a valid NDA isn't available for the selected supplier, a procurement case of type Send NDA for Signature is automatically created.
8. Open the case in Source-to-Pay Workspace, prepare the NDA, and send it for signing to the suppliers and third parties from a playbook. See 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.

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.

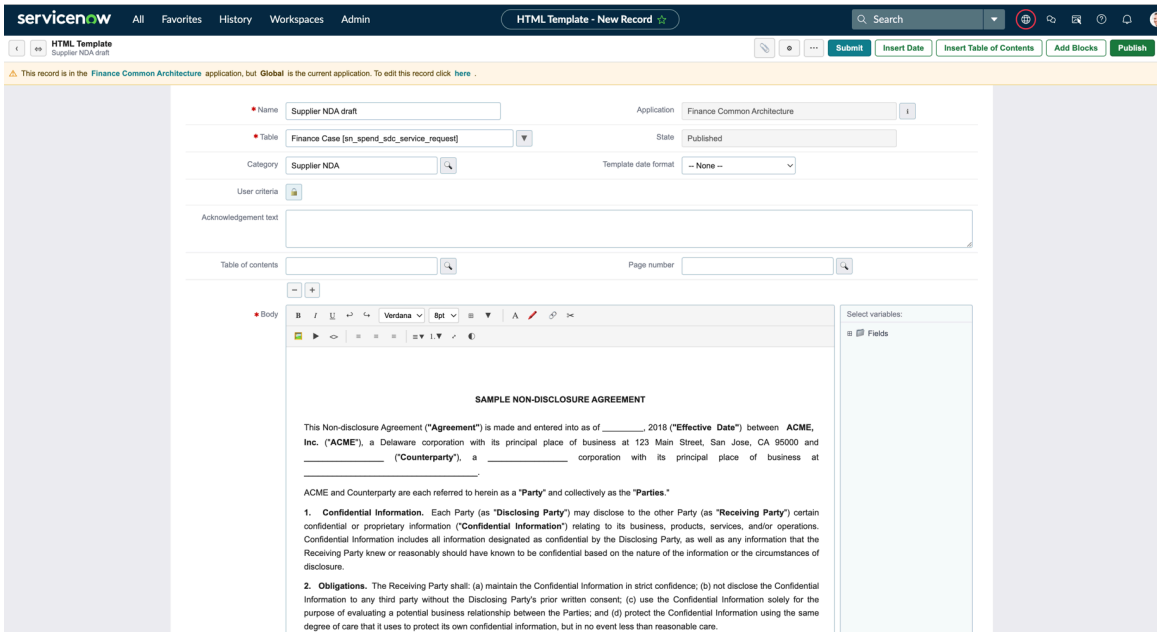
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Before you begin

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 [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.

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Before you begin

Role required: Procurement specialist

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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.

Stages in send NDA for signature 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.
	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	The details are added to the procurement case.

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Stage	Activity	Activity Details
	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.
	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

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process in a task-oriented format. First, you manually verify the address provided by the shopper against the supplier company's addresses available in the delivery locations table. If the shopper's address is invalid or missing, you can request that the shopper provide the correct address through an email. The shopper then updates the address details in the purchase order line. For more information about editing a purchase line, see Edit a purchase order line.

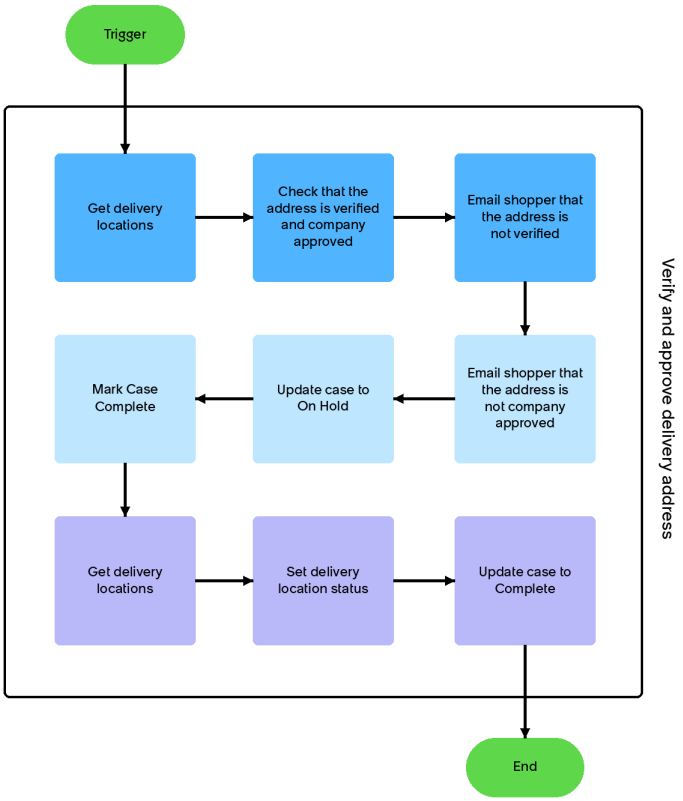
The activity stream, which tracks the interactions between a shopper and an agent, notifies you when the shopper updates the address in the purchase order line.

Review delivery address in playbook

Verify a delivery address presented through the playbook by evaluating the address against supplier addresses and indicating whether it's valid.

Before you begin

Role required: Fulfiller, agent



Procedure

1. Navigate to **All** > **Procurement Case Management** > **Source-to-Pay 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.

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Stages in 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. ○ 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.

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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.

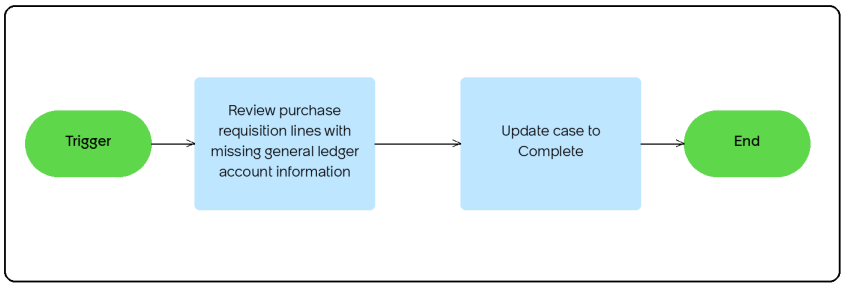
If a shopper checks out multiple products from a single supplier, multiple purchase requisition lines are generated that can contain missing GL accounting details. The purchase requisition lines with missing GL accounting details are auto-populated in a playbook associated with the purchase requisition in the procurement case.

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** > **Source-to-Pay Workspace**.
2. Select the List icon ( ) and select
3. **All work** > **Cases**.
4. Open a procurement case with filter criteria set to **GL Coding Review** and the **State** set to In review.
5. Complete the steps in the various stages and activities of the Verify and approve accounting fields on PRL playbook.

Stages of verify and approve accounting fields 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:

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Stage	Activity	Activity Details
		○ In the **Assigned to** search field, search for and select the person that you want to assign the case to. **Note:** Ensure that the user to whom the GL Coding review case is assigned is part of the General Ledger Accounting group. ○ 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. 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.

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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.

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.

  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 sourcing 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 sourcing 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 sourcing event or create a new sourcing event as required, before working with the sourcing event.

Negotiation setup playbook

The sourcing 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 sourcing events can be modified by the customer from Playbooks. The Declarative Actions can be edited or newly created, and their

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mappings modified in the Activity Definition section. The look and feel of the activities can also be configured from Activity Experience in the Activity Definition section.

For details on how administrators, agents, and fulfillers can configure playbooks, see Running Playbook Experience. 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 sourcing 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 sourcing 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** > **Source-to-Pay 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**.

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10. Review all the cases and tasks related to this sourcing request.
11. **Optional:** To reach out to the appropriate teams for additional clarification on this sourcing request:
    a. Select **Create a type of work**.
    b. On the Create a type of work pop-up window, select the required case or task.
    c. Select **Create**.
    d. Select **Save** to save the case or task and add it to the sourcing request.
12. Select **Continue**.

What to do next

Decide if you want to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead. You can perform these actions from the Sourcing approach section of the sourcing intake playbook. For details, see Select a sourcing approach in playbook. For more information about the qualification process, see Supplier qualification.

Select a sourcing approach in playbook

Decide if you want to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead. You can perform these actions from the Sourcing approach section of the sourcing intake playbook.

Before you begin

Role required: Sourcing manager

Ensure that you have complete clarity on the sourcing request by reviewing the intake details, purchase lines, and approvals, and requesting clarification on the request, if necessary. For details, see Review details and request clarification on a sourcing request in playbook.

Procedure

1. Perform steps 1 through 11, as documented in Review details and request clarification on a sourcing request in playbook.
2. In the Sourcing approach section, choose to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead.

   In case of the former, you can add the sourcing request to an exiting or new sourcing event as required, before working with the sourcing event, as documented in Set up negotiations with suppliers and manage qualifications in playbook.

   In case of the latter, you have the option to work on negotiations after the qualification is complete.
3. Do one of these actions.

Decision	Action
Add to an existing sourcing event	To source with an existing group of requests, select an existing sourcing event from the list. The **Supplier response close** field is au to-populated with the supplier response close date specified in the existing sourcing event that you're adding the sourcing request to.

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Decision	Action
Add to a new sourcing event	To source the request by itself or with a new group of similar requests, add to a new sourc ing event and update the details of this sourc ing event. The supplier response close date specified in the sourcing request is auto-populated in the **Supplier response close** field. If the sourc ing manager changes the supplier response deadline for a new sourcing event, the sourc ing request also reflects this updated date.
Continue	Skip negotiating and start qualifying the sourc ing request. For more information about the qualification process, see Supplier qualification.

What to do next

Work on a negotiation setup playbook to manage qualification work, and review the sourcing requests, suppliers, and purchase lines, all within the premises of a sourcing 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

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 sourcing event.
2. Do one of these actions.

Decision	Action
Create a type of work	On the Create a type of work pop-up window, select the required case or task, and add it to the sourcing event.
Complete qualification	Completes the qualification. **Note:** The procurement cases must be in the Closed Completed state for you to complete the qualification.

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 sourcing event instead.

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Decision	Action
Add to a new sourcing event	To source the request by itself or with a new group of similar requests, add to a new sourc ing event and update the details of this sourc ing event.
Add to an existing sourcing event	To source with an existing group of requests, select an existing sourcing event from the list.
Add pricing to this record	Continue sourcing this request by adding pric ing to this record.

4. If you've added the sourcing request to a new or existing sourcing event, select **Go to sourcing event**.
5. Review the details of the sourcing requests within this sourcing event.
6. **Optional:** Select **Add sourcing requests** if you want to add more similar sourcing requests to this sourcing event.
7. Select **Continue**.
8. Review the details of the suppliers within this sourcing event.
9. **Optional:** Select **Add suppliers** if you want to add more suppliers to this sourcing 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 sourcing 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 sourcing 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.

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.

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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 Use 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 sourcing 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** > **Source-to-Pay 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.

Stages of create a due diligence request 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:

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Stage	Activity	Activity Details
		○ 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
	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.

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Stage	Activity	Activity Details
	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 has been approved.	The requester is notified when the DD Request is approved by TPRM team.
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.

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Stage	Activity	Activity Details
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.

Using Spend and Savings Management

Use Spend and Savings Management to import and manage your organization's category taxonomy.

Map spend categories to product categories using an Excel file

You can map spend categories to product categories using an Excel file to better organize and manage your organization’s expenses by grouping similar goods or services into logical categories.

The process for mapping spend categories to product categories using an Excel file includes the following tasks:

1. Add spend category data in an Excel file.
2. Load and map spend categories to existing product categories.
3. Run transform to import spend category data into the Spend Category primary table.

Add spend category data in an Excel file

You can download and add spend category data in an Excel file template.

Before you begin
Role required: sn_spend_mgmt.category_manager_admin

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Procedure

1. Select **All**.
2. In the navigation filter, enter **sn_spend_mgmt_category_stage_list.do**.
3. Right-click any column heading and select **Export** > **.xlsx**.
4. Select **Download** to save the spreadsheet on your local system.

Result

An Excel template is created with the required columns for adding the spend category data. Use this Excel spreadsheet to enter the supplier data that you want to import and store into the Spend Category Stage (sn_spend_mgmt_category_stage) staging table.

What to do next

Load the spend category data from the excel template into the Spend Category Stage (sn_spend_mgmt_category_stage) staging table. For more information, see Load and map spend categories to existing product categories.

Load and map spend categories to existing product categories

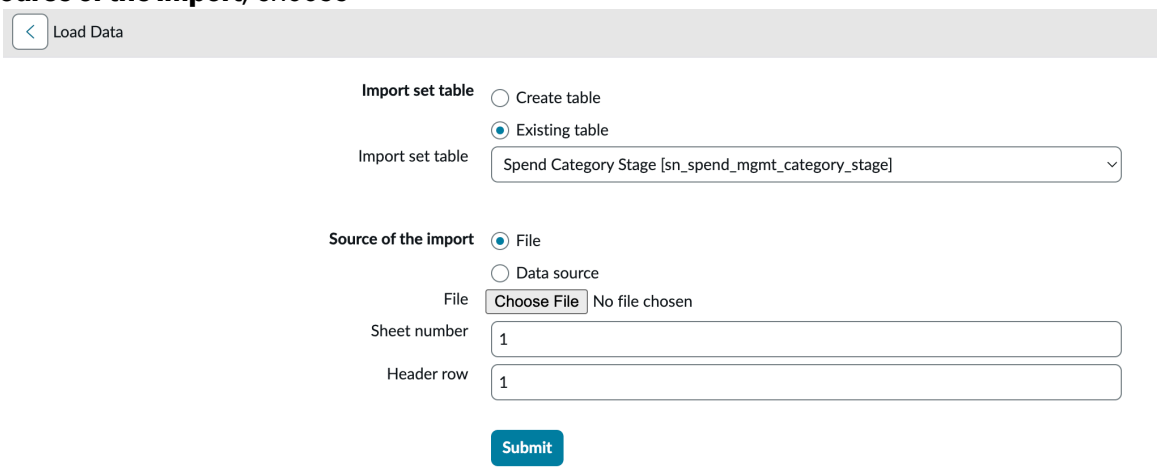
As a Spend category admin, you can use spend category management to import your organization's spend categories and map them to ServiceNow product categories.

Before you begin

Role required: sn_spend_mgmt.category_manager_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 the Spend Category Stage (sn_spend_mgmt_category_stage) table.
4. In **Source of the Import**, choose



   File.
5. Browse to the excel template that was created in Add spend category data in an Excel file.
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**.

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Result
The Excel template with spend category data is uploaded.

What to do next
Run the transform to import the data from the Spend Category Stage table to the Spend Category primary table. For more information, see Run transform to import spend category data into the Spend Category primary table.

Run transform to import spend category data into the Spend Category primary table

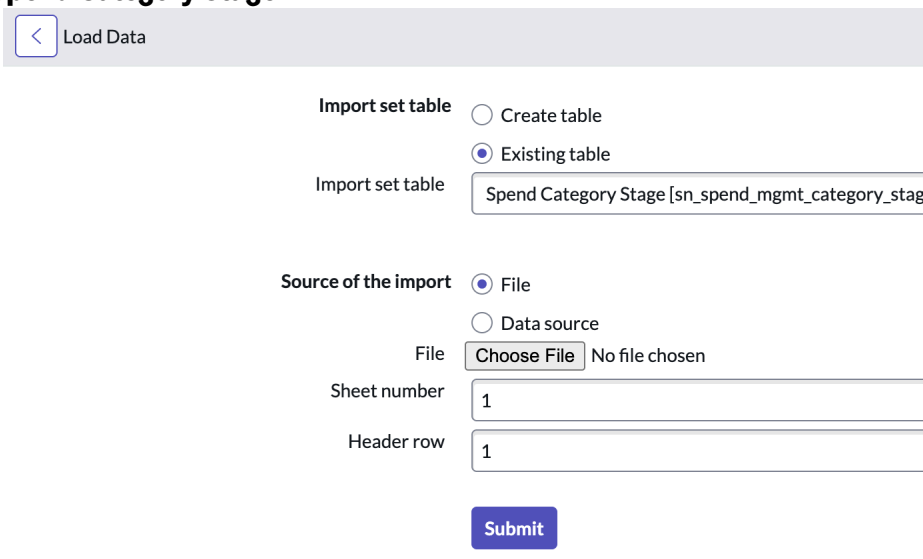
Run transform to import the data records from the Spend Category Stage (sn_spend_mgmt_category_stage) staging table into the Spend Category (sn_spend_mgmt_category) primary table.

Before you begin
Role required: sn_spend_mgmt.category_manager_admin

About this task
Here's how the transform map works:

- In the Spend Category table, only the Category name field is mandatory and must be unique; all other fields are optional.
- During transformation, if either the Spend category manager or Sourcing manager is not found, the Spend category record is skipped and an error is logged.
- If the Parent spend category does not already exist, it is created automatically.
- If a matching Product category cannot be found using either the UNSPSC or Category name, the corresponding many-to-many (m2m) record is not created, and the issue is logged accordingly.

Procedure
1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Existing table**.
3. In the **Import set table** field, select **Spend Category Stage (sn_spend_mgmt_category_stage)**.



4. In the **Source of the import** field, select **File**.
5. Select **Choose File** and select the source Excel spreadsheet.

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6. **Optional:** Specify the worksheet number in the **Sheet number** field and header row number in the **Header row** field.
7. Select **Submit**.
   The imported data is now available in the new Import Set table.
8. Select **Run Transform**.

   Important: Ensure that the **Import set** field shows sn_spend_mgmt_category_stage and the **Selected maps, run in order** field shows Load spend categories and map to product categories - sn_spend_mgmt_category.

9. Select **Transform**.
10. **Optional:** Verify that the data records were imported into the Spend Category (sn_spend_mgmt_category) primary table.

Map spend categories to product categories manually

You can manually map spend categories to product categories to better organize and manage your organization's expenses by grouping similar goods or services into logical categories.

Before you begin

Role required: sn_spend_mgmt.category_manager_admin

Procedure

1. Navigate to **All** > **Spend and Savings Management** > **Spend Categories**.
2. Select **New**.
3. On the form, fill in the fields.

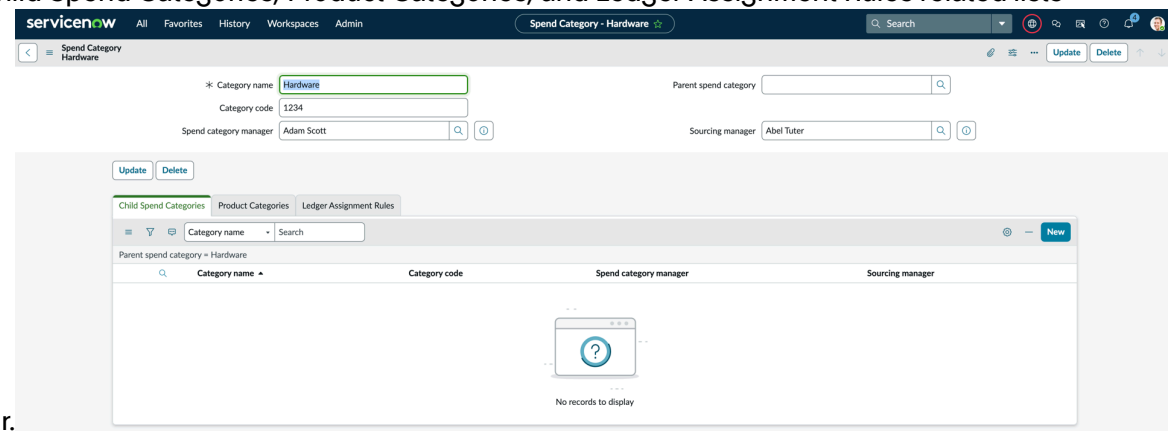
Spend category form

Field	Description
Category name	Name of the spend category.
Category code	Code of the spend category.
Spend category manager	Name of the spend category manager.
Parent spend category	Category that contains more specific child categories or subcategories of spend.
Sourcing manager	Name of the sourcing manager.

4. Select **Submit**.

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The Child Spend Categories, Product Categories, and Ledger Assignment Rules related lists appear.



5. Do the following:

Actions to be performed in Spend category

To	Do this
Create child spend categories	**a.** Select the **Child Spend Categories** related list, and select **New**. **b.** On the form, fill in the fields. The **Parent spend category** field is auto-populated. See step 3 for a description of the field values on the Spend category form.
Create product categories	**a.** Select the **Product Categories** related list and select **Edit**. **b.** In the collection list pop up window, do one of the following to move the categories to the Product Categories List ▪ Select a category and then click the right arrow icon (>) icon. ▪ Double-click a category. **Note:** In the Collection list, you can search for product categories by entering the category name or by using wild cards (*). **c.** Select **Save**.
Create ledger assignment rules	Select the **Ledger Assignment Rules** related list and select **New**. For more information, see Create ledger assignment rules.

Action or dismiss a savings opportunity

Convert a savings opportunity into a pipeline project, or dismiss it with a reason.

When a savings opportunity is created, it has an **Open** status by default. After reviewing the opportunity in the Now Assist Panel, the opportunity moves to one of two outcomes:

- **Closed**: The user accepts the opportunity. A pipeline project is created from the opportunity and linked to it, moving it into the sourcing pipeline for execution.
- **Dismissed**: The user rejects the opportunity and provides a reason. The card is removed from the Potential savings opportunities page and the dismissal reason is saved on the opportunity record.

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Note: After an opportunity is closed or dismissed, the action is not reversible.

Review a savings opportunity and create a pipeline project

Open a savings opportunity discovered by the Savings Opportunity Discovery agentic workflow and create a pipeline project that tracks the savings.

Before you begin

The Now Assist Panel deployment for the relevant Opportunity Finder agent must be active. The weekly Savings Opportunity Finder Agents Scheduled Job uses the same check before running each agent.

Role required: sn_spend_mgmt.sourcing_category_manager, sn_spend_mgmt.category_manager_admin, and sn_spend_pipeline.sourcing_pipeline_user

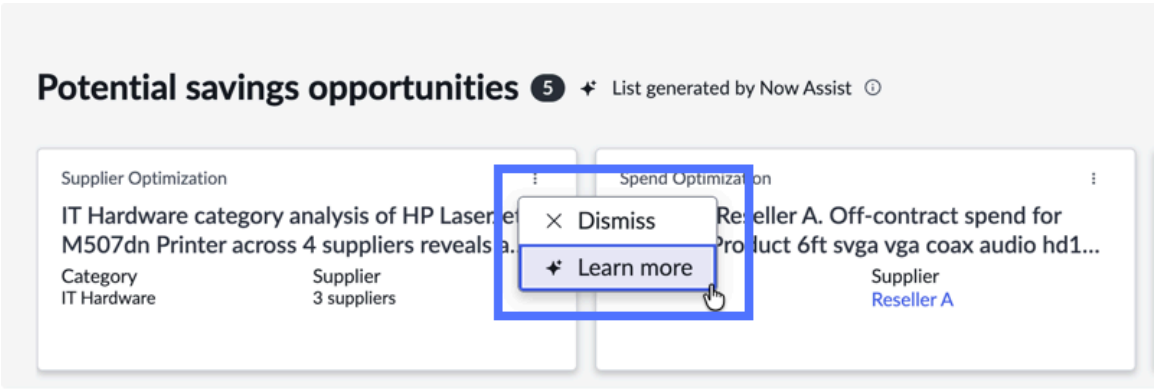
About this task

Three agents create opportunity records: the Contract Optimization Opportunity Finder Agent, the Supplier Optimization Opportunity Finder Agent, and the Spend Optimization Opportunity Finder Agent. The **Learn more** action on an open opportunity card launches the Savings Opportunity Discovery use case, which routes to the correct agent based on the opportunity's lever.

While pipeline project creation is in progress, the opportunity status moves to **In progress** and the record is locked from changes by other users until the flow completes or is cancelled.

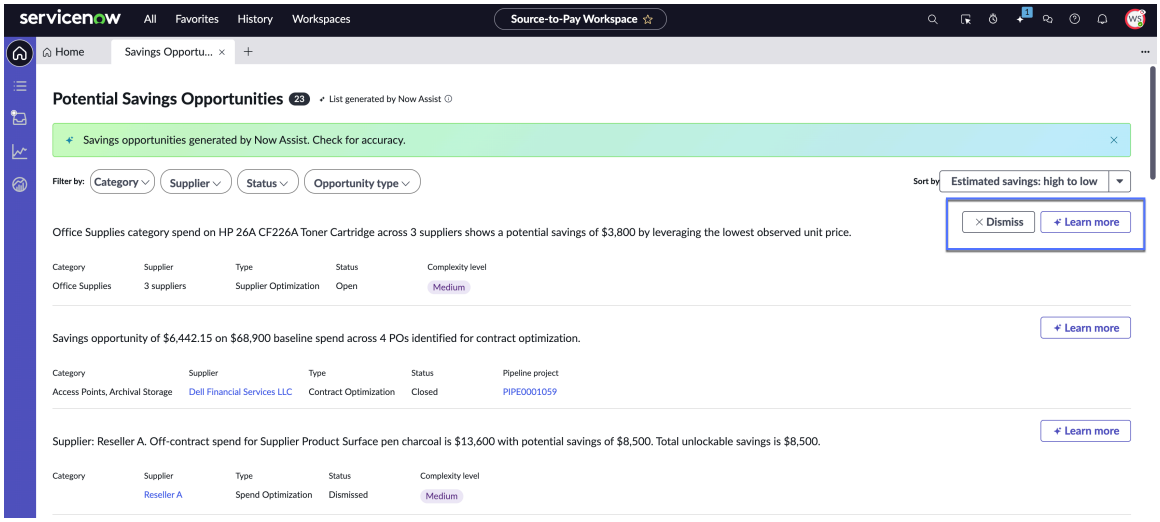
Procedure

1. From the **Workspaces** tab, select **Source-to-Pay Workspace**.
2. Select the **Category management** tab.
3. Do one of the following:
   - In the Potential savings opportunities section, in the opportunity card you want to work on, select the three dots menu, and then select **Learn more**.



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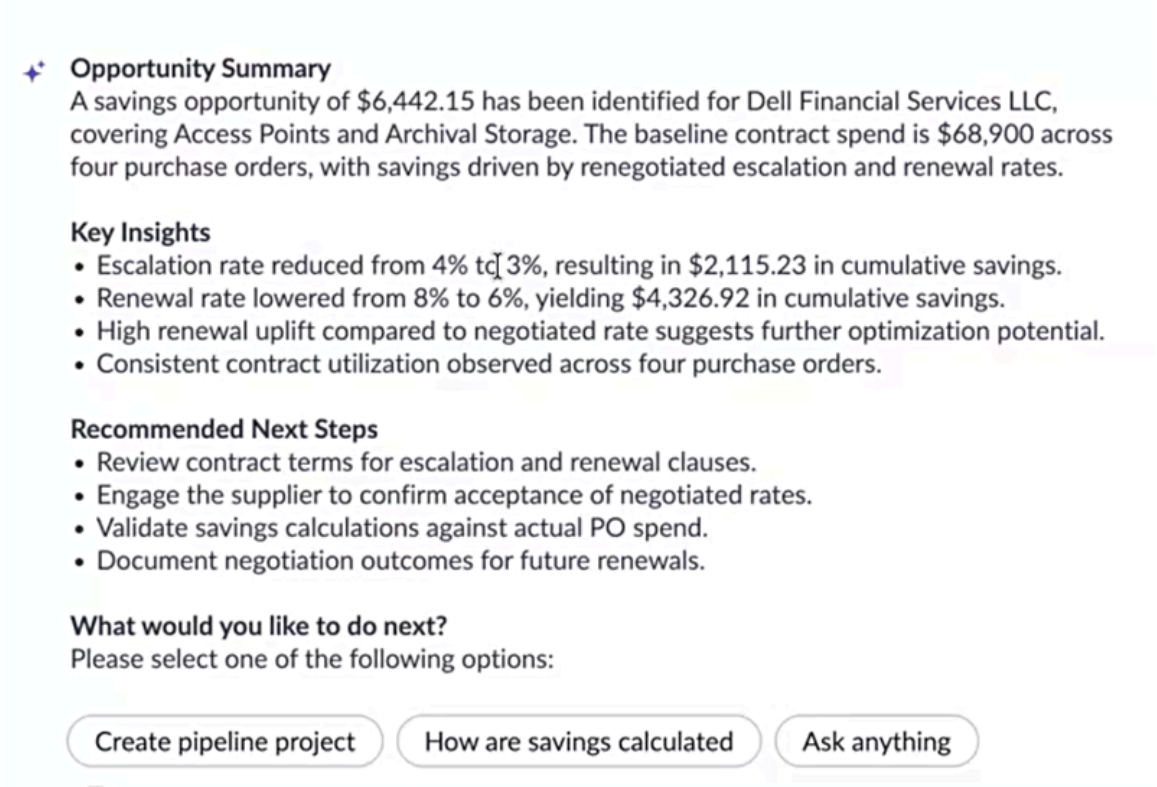
- In the Potential savings opportunities section, select **View all**. Then, in the Potential Savings Opportunities page, select **Learn more** for the opportunity you want to act on.



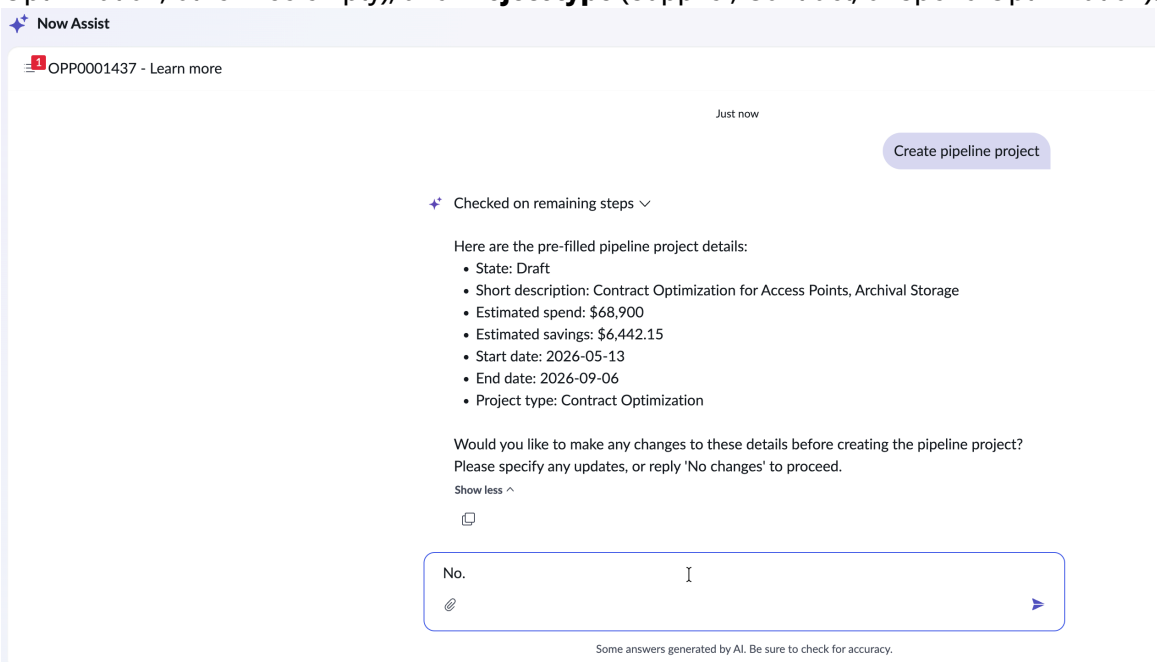
4. Review the content in each section of the Now Assist Panel.

- **Opportunity Summary**: A narrative paragraph summarizing the total estimated savings, the supplier, the spend categories covered, the baseline contract spend, and the savings levers that produced the opportunity.
- **Key Insights**: A list of specific findings that support the opportunity, such as the current and proposed values for each savings lever and the cumulative savings attributable to each. The insights also include observations about contract utilization or spend patterns relevant to the finding.
- **Recommended Next Steps**: A list of suggested actions to progress the opportunity, such as reviewing the relevant contract clauses, engaging the supplier to confirm negotiated rates, or validating the savings calculation against actual spend.
- **What would you like to do next?**: Predefined options such as **Create pipeline project**, **How are savings calculated**, and **Ask anything** appear . The predefined options vary according to the opportunity type. Select an option or type directly in the chat input to continue the conversation.

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5. **Optional:** Ask follow-up questions about the opportunity in the chat.
   For example, ask `How were the savings calculated?`, `Show the related contracts`, or `List the pipeline projects linked to this opportunity`. The agent calls the results appear in the chat without ending the conversation .
6. Select **Create pipeline project**.
   The following pre-filled project details appear: **State** (Draft), **Short description**, **Estimated spend**, **Estimated savings**, **Start date** (today), **End date** (contract end date for Contract Optimization; otherwise empty), and **Project type** (Supplier, Contract, or Spend Optimization).



7. Review the pre-filled values and reply **Yes** to make changes or **No** to proceed.

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If you reply **Yes**, enter the field to change in the chat . The revised summary appears for confirmation before proceeding.

8. Select a priority when prompted: **1 - Critical**, **2 - High**, **3 - Moderate**, **4 - Low**, or **5 - Planning**.
   Only values 1 through 5 are accepted; the agent re-prompts for an invalid value.
9. Wait for the agent to create the pipeline project.
   The agent calls the pipeline project creation flow .
   On success, the agent returns the pipeline project number as a hyperlink along with the state, priority, and project type.

   Trouble?
   If the pipeline project creation fails, an error message appears with an option to retry .
10. Choose whether to generate a chat summary when prompted with **Yes** or **No**.
    If you select **Yes**, the agent generates a 3–5 sentence work note covering the project description, estimated savings, start date, and recommended next steps.
11. Review the draft summary and reply **Yes** to make changes or **No** to confirm.
    If you reply **Yes**, provide the revisions in chat and confirm the updated summary before proceeding.
12. Select **Post to work notes** to attach the summary to the new pipeline project, or **End chat** to close the conversation.

Result

A pipeline project record is created and linked to the opportunity, contracts, suppliers, and purchase orders referenced by the opportunity. The opportunity record is updated to reflect the action.

What to do next

The following fields on the draft pipeline project are prefilled from the opportunity. Review and update any values before progressing the project.

Pipeline project draft fields prefilled from the opportunity

Field	Description
Short description	Opportunity type and the related spend categories.
Estimated spend	Baseline or consolidated spend captured for the opportunity.
Estimated savings	Savings value calculated for the opportunity.
Estimated start date	Current date.
Estimated end date	Renewal start date when the opportunity is based on a contract. The contract end date is used as a fallback.
Project type	Determined by the opportunity type.
Previous records	Source records linked by opportunity type: contracts for contract optimization, purchase orders for spend optimization, and suppliers for supplier optimization.

Dismiss a savings opportunity

Reject a savings opportunity that you do not intend to pursue, recording who dismissed it, when, and why so it stays on record for auditing.

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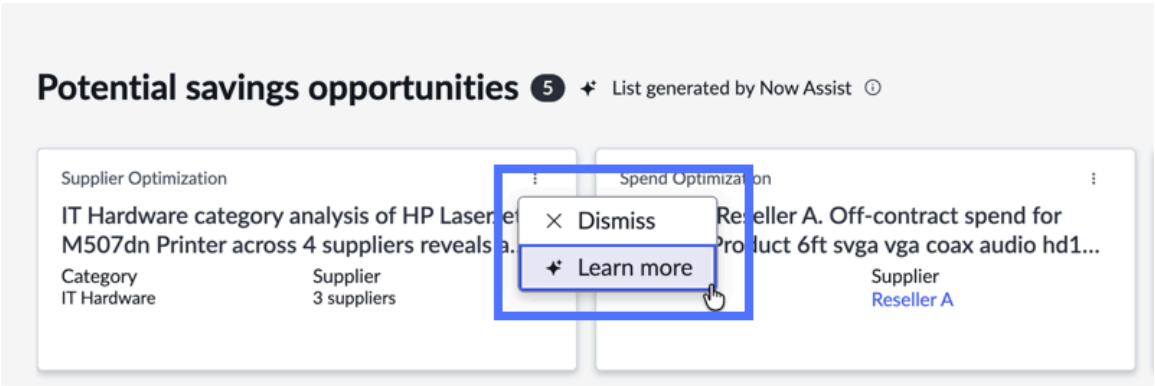
Before you begin

The **Dismiss** option is available only to the user assigned as Spend category manager on the Spend categories table for the opportunity's spend category. A manager assigned to a parent spend category can dismiss opportunities for any of its child categories. The option is hidden for users who do not meet this condition.

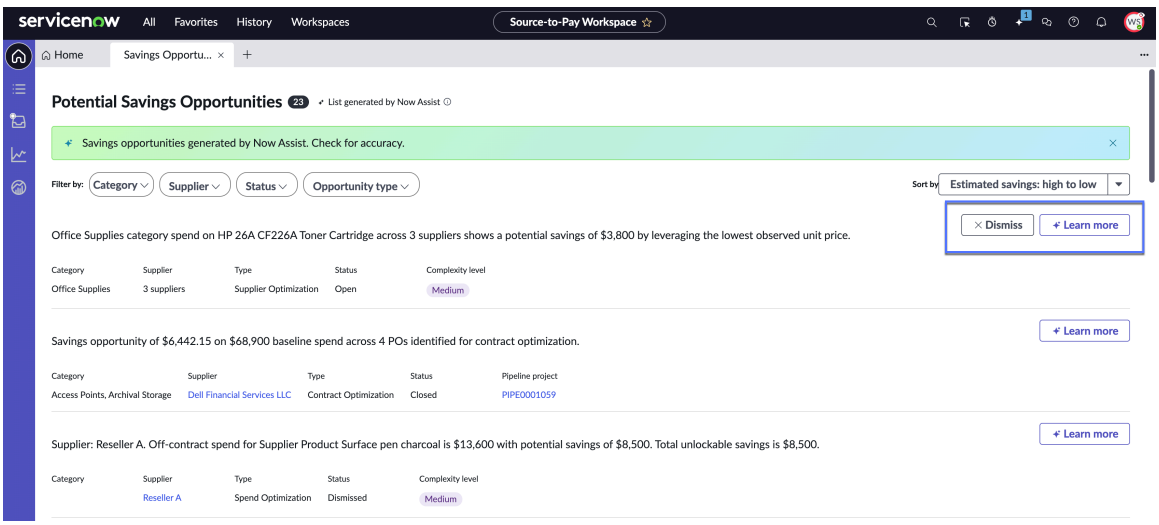
Role required: sn_spend_mgmt.category_manager_admin

Procedure

1. From the **Workspaces** tab, select **Source-to-Pay Workspace**.
2. Select the **Category management** tab.
3. Do one of the following:
   - In the Potential savings opportunities section, in the opportunity card you want to dismiss, select the three dots menu, and then select **Dismiss**.



   - In the Potential savings opportunities section, select **View all**. Then, in the Potential Savings Opportunities page, select **Dismiss** for the opportunity you want to dismiss.



4. In the **Share feedback** modal, select one or more reasons from the checklist.

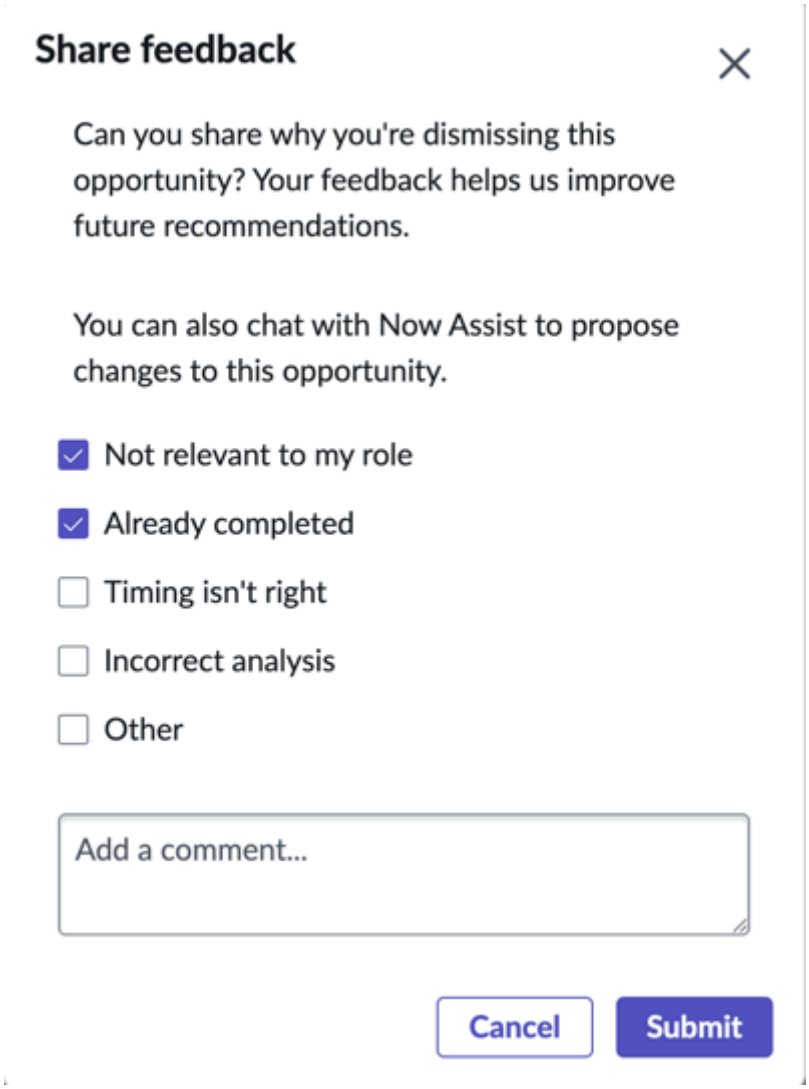
   At least one reason is required. The available options are:

   - **Not relevant to my role**
   - **Already completed**
   - **Timing isn't right**

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- **Incorrect analysis**
- **Other**

Optionally, add a comment in the **Add a comment** field to provide more context. You can also chat with Now Assist from this modal to propose changes to the opportunity before dismissing it.



5. Select **Submit**.
   The opportunity **Status** moves to **Dismissed**. The **Dismissed reason**, **Dismissed by**, and **Dismissed date** fields are populated. The card is removed from the **Potential Savings Opportunities** page and the **Category Management** tab.

   Note: If the dismissal does not process, verify that the sn_spend_mgmt.category_manager_admin role is assigned and that the opportunity is not in progress.

Result

The opportunity remains on the Savings Opportunities table with **Status** of **Dismissed** and the dismissal audit fields filled in. The record is not deleted. The dismissal reason is captured as structured agent feedback; subsequent discovery runs consume that feedback to deprioritize patterns that have been rejected and to refine the scoring of future opportunities. When new data materially changes the savings estimate on a dismissed opportunity, the agentic workflow can regenerate it for re-evaluation.

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What to do next

Note: If the opportunity still appears on the **Potential Savings Opportunities** page after dismissal, refresh the page. If the issue persists, verify that the **Status** field on the record is set to **Dismissed**.

To reopen a dismissed opportunity, set **Status** back to **Open** in the Savings Opportunities table. The UI policy reverses and hides the dismissal fields, but the previously entered values are retained on the record.

The **Learn more** Now Assist trigger remains available on dismissed records because the trigger's condition only suppresses it for `status = closed`.

Using Sourcing Pipeline Management

Use Pipeline Sourcing Management to create pipeline projects that capture key financial and opportunity data while providing end-to-end visibility into all sourcing activities.

Add a pipeline project to a sourcing request

Add a pipeline project to a sourcing request to link project details, reduce manual data entry, and track sourcing progress against project timelines.

Before you begin

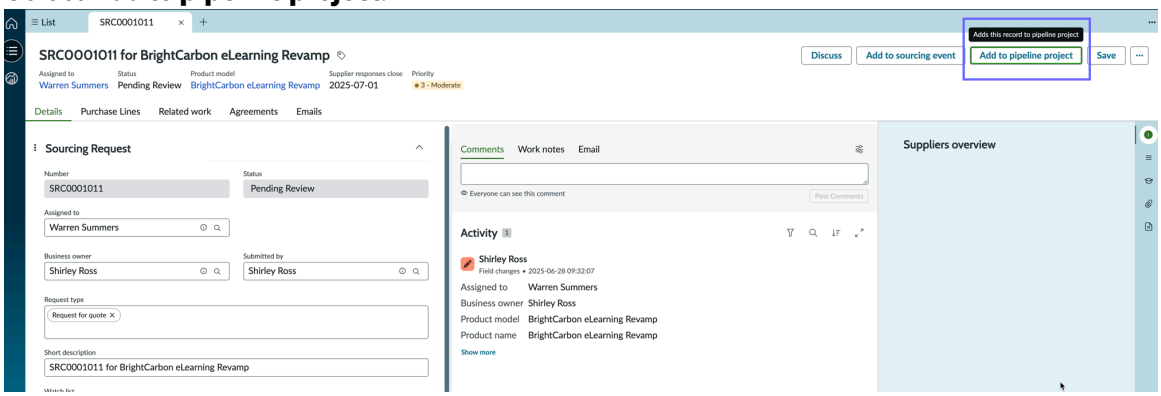
Role required: sn_shop.procurement_specialist

About this task

You can add pipeline projects to sourcing requests that are in either the Pending Review or Pending Approval state.

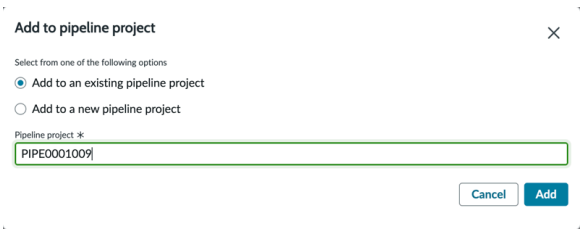
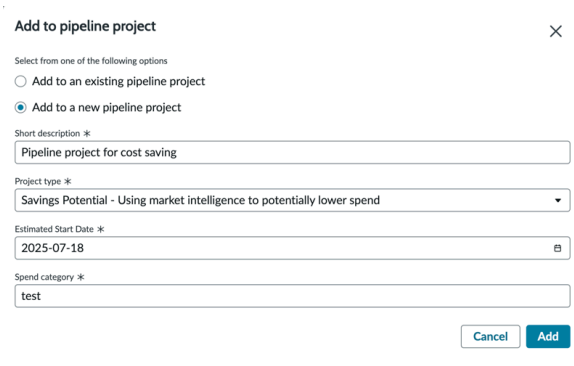
Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ) and do one of the following:
   - Navigate to **Lists** > **My work** > **Sourcing requests**.
   - Navigate to **Lists** > **All work** > **Sourcing requests**.
3. Select the link to the sourcing request under the Number column.
4. Select **Add to pipeline project**.



5. In the Add to pipeline project dialog box, do one of the following:

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To	Do this
Add the sourcing request to an existing pipeline project.	 ○ Select **Add to an existing pipeline project**. ○ From the **Pipeline project** list, search for and select a project. **Note:** The list displays only those pipeline projects that are in either the Draft or Planned state and that share the same spend category as the sourcing request.
Add the sourcing request to a new pipeline project.	 ○ Select **Add to a new pipeline project**. ○ In the **Short description** field, enter a brief summary of the pipeline project. ○ In the **Description** field, enter detailed project information. ○ From the **Project type** list, select one of the following options: ▪ Supplier Optimization ▪ Contract Optimization ▪ Savings Potential ▪ Spend Optimization ▪ Risk Reduction ○ In the **Estimated Start Date** field, enter the target start date for the pipeline project. ○ In the **Spend Category** field, select the spend category that matches that of the sourcing request.

6. Select **Add**.
   The sourcing request is associated with either an existing or a new pipeline project. It is displayed in the **Sourcing Requests** tab of the pipeline project.

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Create a pipeline project manually

Create a pipeline project manually to record project details that are not automatically generated through an intake request.

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ) and do one of the following:
   - Navigate to **Lists** > **My work** > **Pipeline projects**.
   - Navigate to **Lists** > **All work** > **Pipeline projects**.
3. Select **New**.
   The Create New Pipeline Project form is displayed. For a description of the field values, see Create New Pipeline Project form.
4. Select **Save**.
   The pipeline project is created in the Planned state.

   For more information about the tabs and UI actions available in the pipeline project record, see Pipeline project record tabs and UI actions.

Report savings when awarding a supplier

When awarding a supplier, enter the spend and savings data for the sourcing event associated with the pipeline project.

Before you begin

Role required: sn_spend_pipeline.pipeline_management_admin

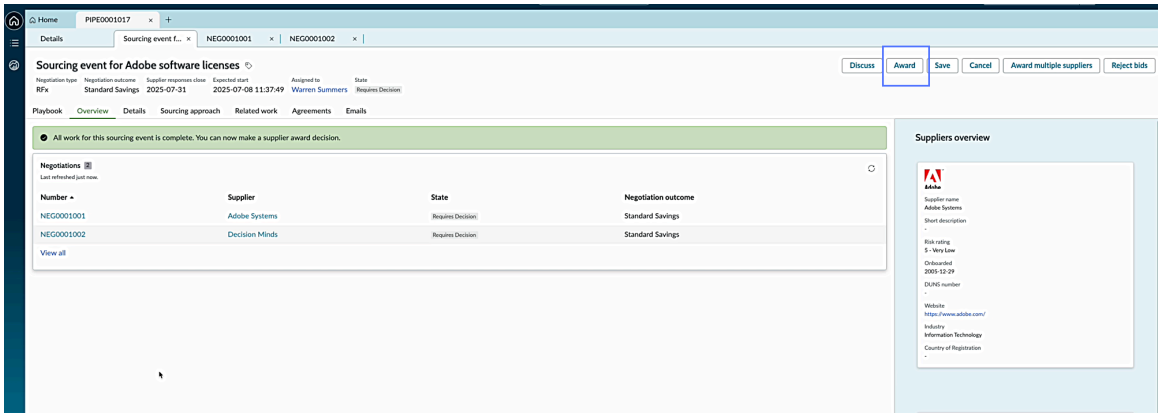
About this task

The sourcing event that you plan to work on, and all its associated negotiations, sourcing requests, and purchase lines must be in the Requires Decision state. When negotiations are complete for a sourcing event, you can award one or more suppliers. Awarding suppliers creates purchase requisitions for the selected suppliers and items.

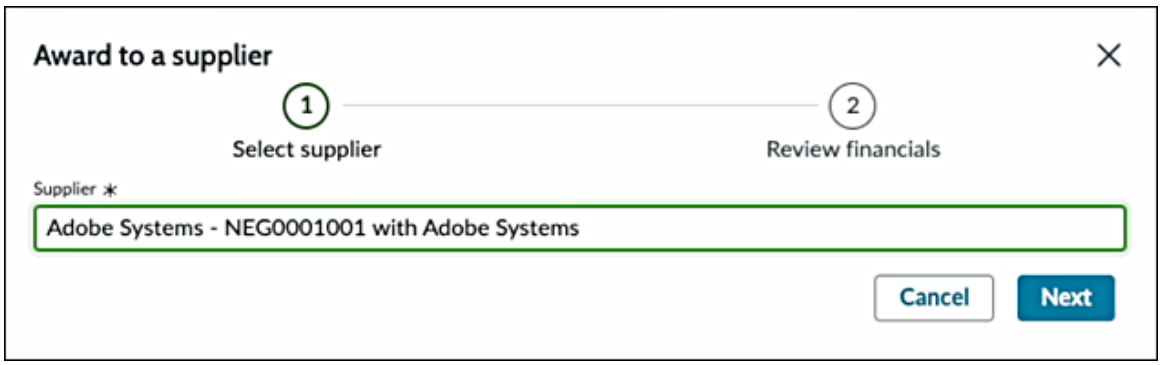
Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ) and do one of the following:
   - Navigate to **Lists** > **My work** > **Sourcing events**.
   - Navigate to **Lists** > **All work** > **Sourcing events**.
3. Open the sourcing event that is in Requires Decision state.

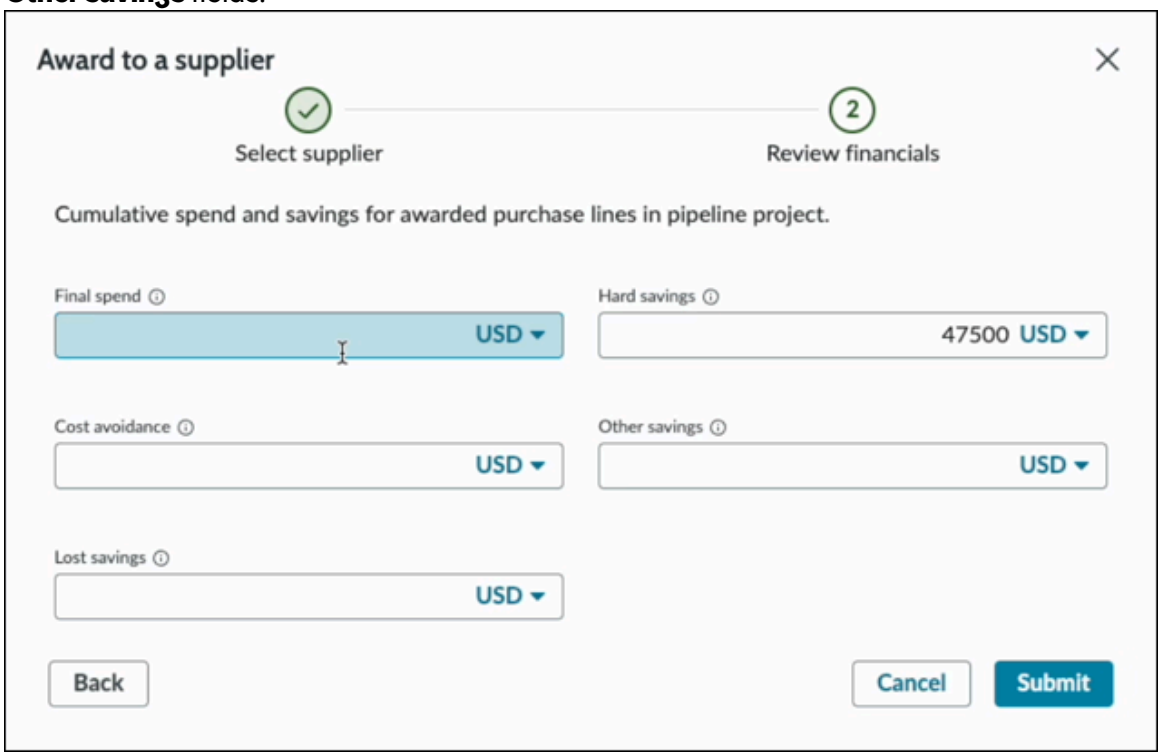
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4. Select **Award**.
   The Award to a supplier dialog box is displayed.
5. In the **Supplier** field, select a supplier, and then select **Next**.



6. Enter the spend and savings data in the **Final spend**, **Cost avoidance**, **Lost savings**, and **Other savings** fields.



Note: The Review financials modal is displayed only if the sourcing event is associated with a pipeline project.

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The **Hard savings** field is auto-populated and displays the cumulative savings from all sourcing events associated with the pipeline project. This value is calculated by summing the Negotiated savings from all closed purchase requisition lines (PRLs) within the sourcing events.

You can edit the **Hard savings** field if you'd like. If you edit the **Hard savings** field, a warning message appears indicating that the entered value differs from the cumulative negotiated savings on PRLs. This warning is shown only if there are negotiated savings on any PRL.

7. Select **Submit**.

Report savings when awarding multiple suppliers

When awarding multiple suppliers, enter the spend and savings data for the sourcing event associated with the pipeline project.

Before you begin

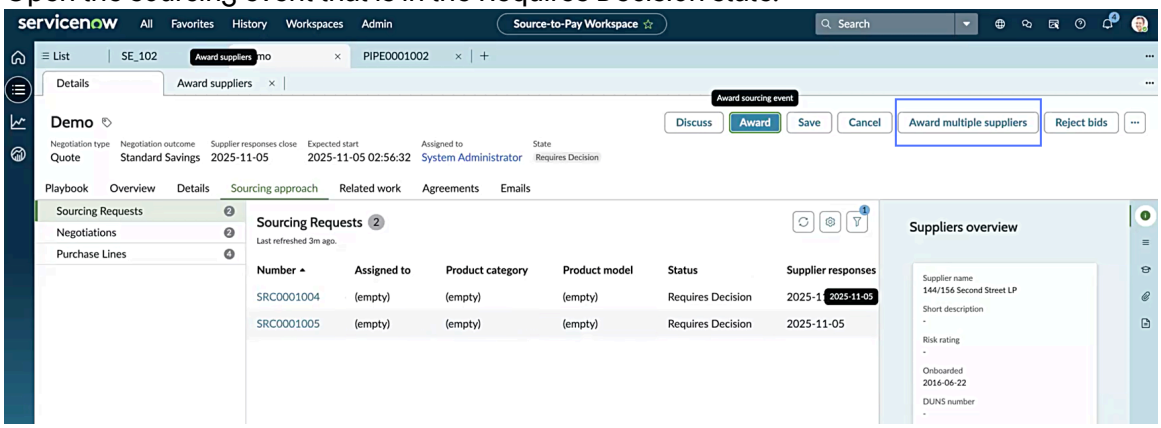
Role required: sn_shop.procurement_specialist

About this task

The sourcing event that you plan to work on, and all its associated negotiations, sourcing requests, and purchase lines must be in the Requires Decision state. When negotiations are complete for a sourcing event, you can award one or more suppliers. Awarding suppliers creates purchase requisitions for the selected suppliers and items.

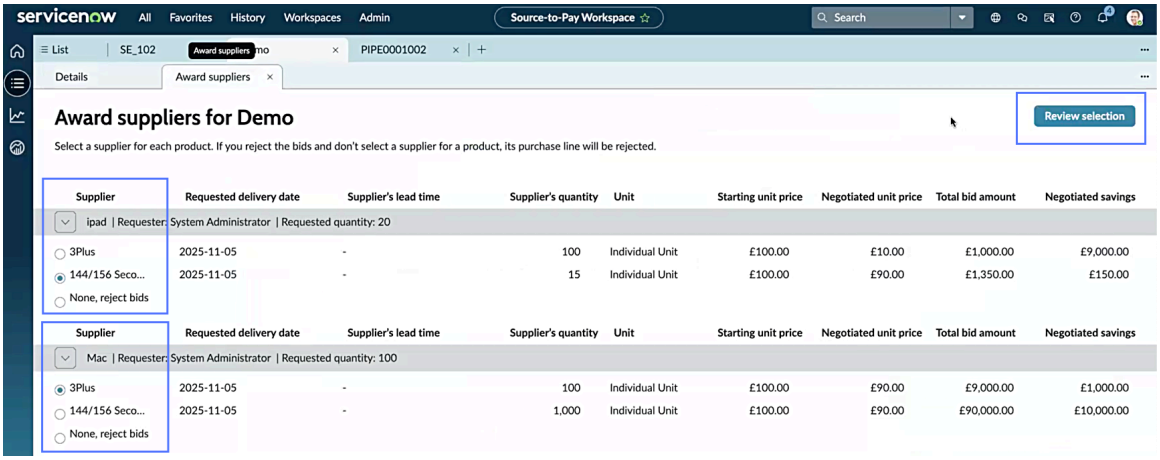
Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ) and do one of the following:
   - Navigate to **Lists** > **My work** > **Sourcing events**.
   - Navigate to **Lists** > **All work** > **Sourcing events**.
3. Open the sourcing event that is in the Requires Decision state.



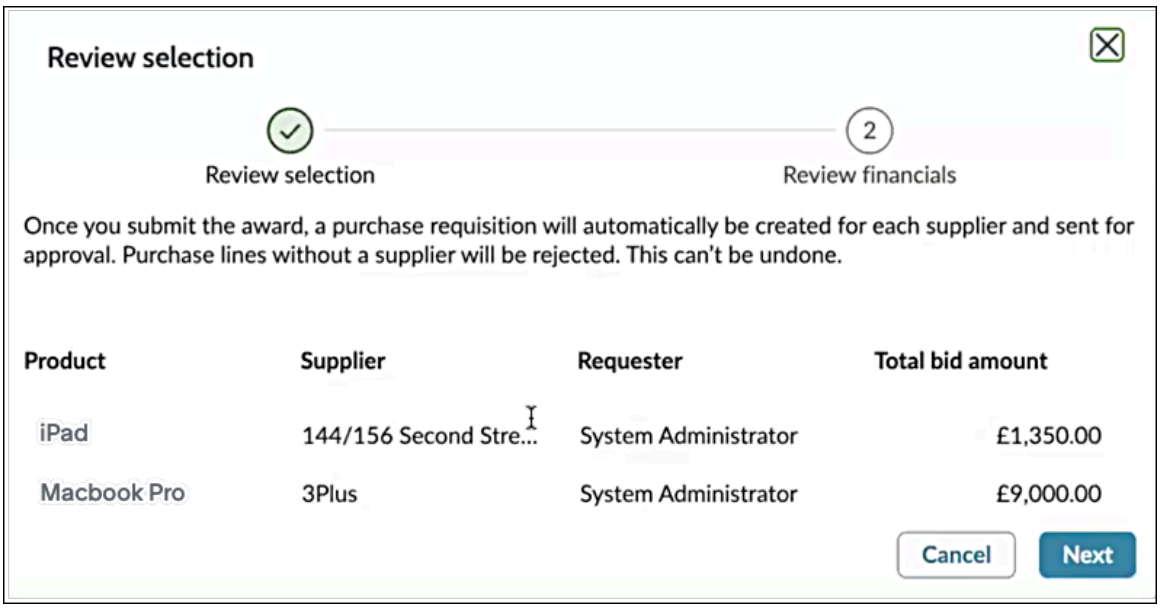
4. Select **Award multiple suppliers**.
   The Award suppliers for sourcing event page is displayed.

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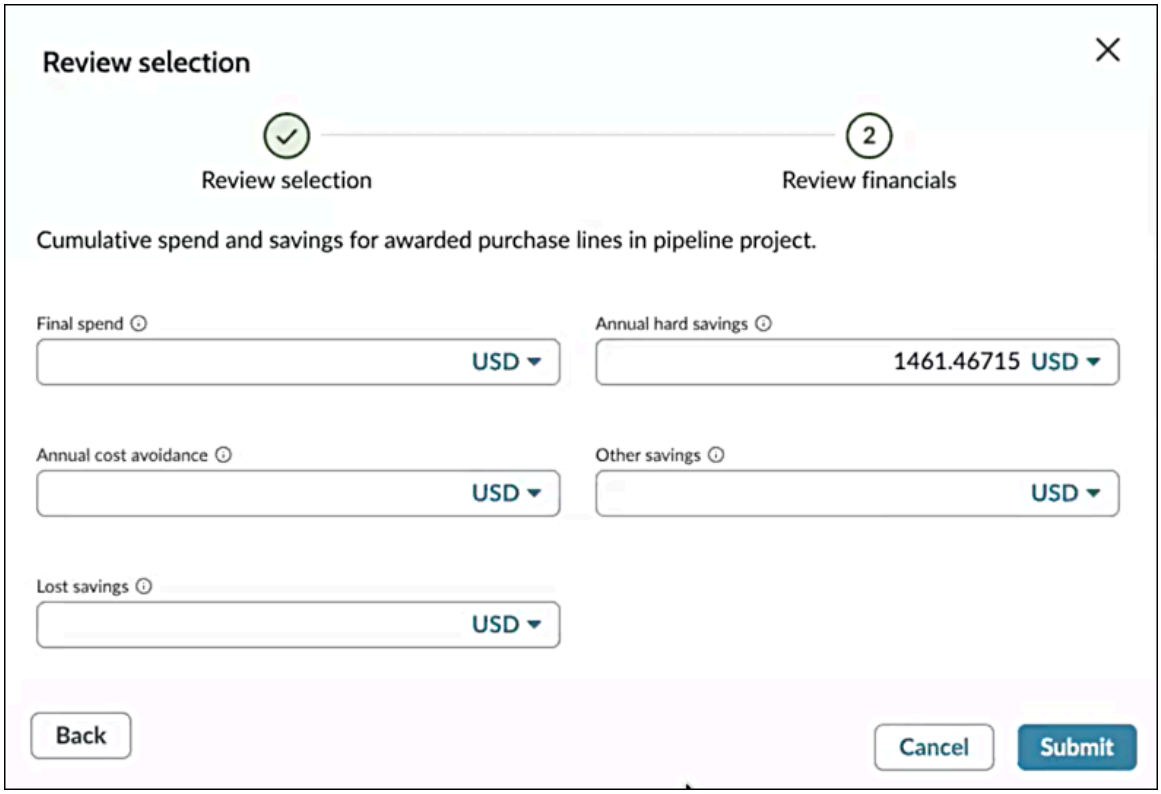
5. Select the supplier for each product you want to purchase.
6. Select **Review selection**.

   The Review selection dialog box is displayed.



7. Select **Next**.
8. Enter the spend and savings data in the **Final spend**, **Annual cost avoidance**, **Lost savings**, and **Other savings** fields.

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Note: The Review financials modal is displayed only if the sourcing event is associated with a pipeline project.

The **Annual hard savings** field is auto-populated and displays the cumulative savings from all sourcing events associated with the pipeline project. This value is calculated by summing the Negotiated savings from all the selected purchase lines on the Award suppliers page.

You can edit the **Annual hard savings** field if you'd like. If you edit the **Annual hard savings** field, a warning message appears indicating that the entered value differs from the cumulative negotiated savings on PRLs. This warning is shown only if there are negotiated savings on any PRL.

9. Select **Submit**.

Result

The sourcing 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. In addition, the spend and savings data is updated in the associated pipeline project.

Close a pipeline project

As a sourcing manager, you can close the pipeline project when all the activities related to the sourcing pipeline project have been completed.

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 sourcing 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

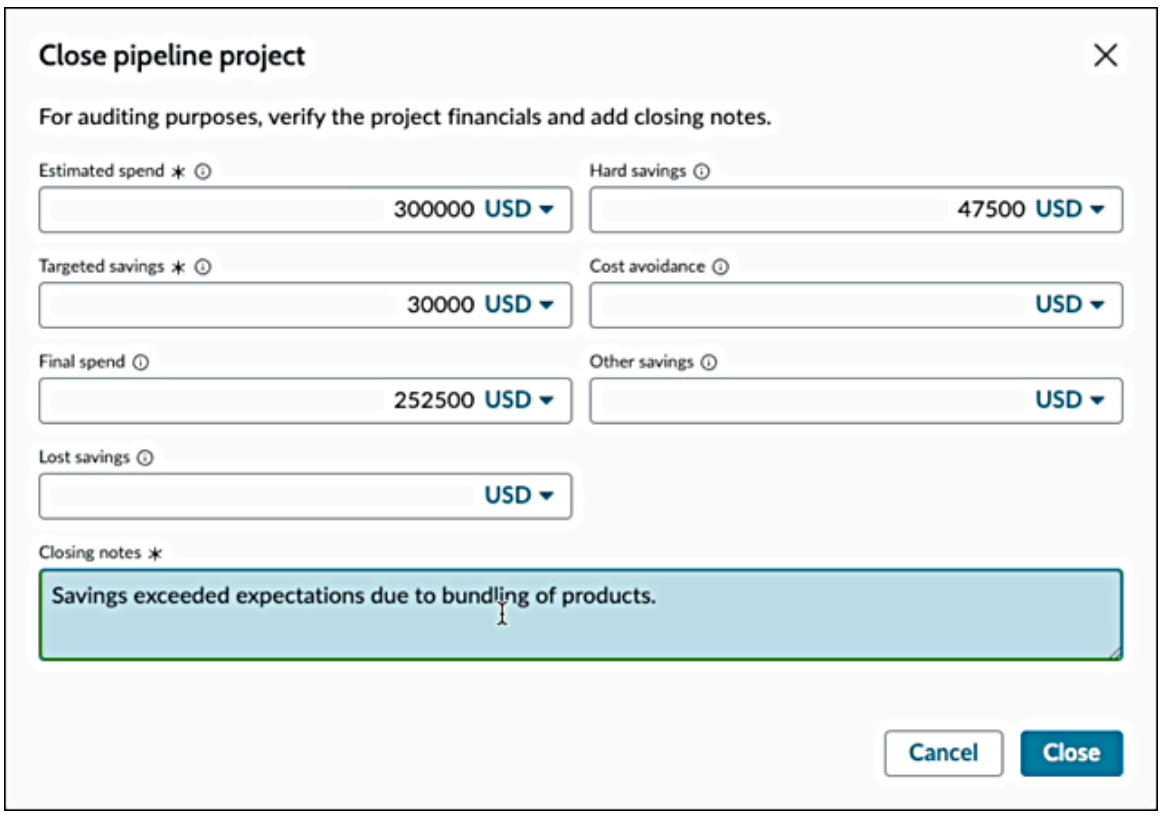
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Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ) and do one of the following:
   - Navigate to **Lists** > **My work** > **Pipeline projects**.
   - Navigate to **Lists** > **All work** > **Pipeline projects**.
3. Open the pipeline project that is in Work in progress state.
4. Select **Close**.

   The system checks that all related objects, such as sourcing requests and sourcing events, are closed. If any of the related objects are open, an error message prompts you to close them.

   The Close pipeline project dialog box is displayed.



   The **Hard savings** field is auto-populated and displays the cumulative savings from all sourcing events associated with the pipeline project. This value is calculated by summing the Negotiated savings from all closed purchase requisition lines (PRLs) within the sourcing events.

   You can edit the **Hard savings** field if you'd like. If you edit the **Hard savings** field, a warning message appears indicating that the entered value differs from the cumulative negotiated savings on PRLs. This warning is shown only if there are negotiated savings on any PRL.

5. Enter the project's financial data in the **Estimated spend**, **Hard savings**, **Targeted savings**, **Cost avoidance**, **Final spend**, **Other savings**, and **Lost savings** fields.
6. In the **Closing notes** field, enter a brief summary of the pipeline project that provides context for future reference, auditing, or reporting.
7. Select **Close**.
   The pipeline project moves to the Closed Complete state.

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Create a pipeline project from an expiring contract

As a sourcing manager, you can create a pipeline project directly from an expiring contract using a guided, decision-based workflow.

Before you begin

Role required: sn_spend_pipeline.pipeline_management_admin

Procedure

1. Navigate to Source-to-Pay Workspace.
2. Select the **Category management** tab.
3. Under the Contracts section, select the **Expiring within 90 days** widget.
   The list of expiring contracts is displayed.
4. Select and open a contract for which you want to create a pipeline project.
5. From the **Pipeline project** drop-down list, select one of the following options:
   - **Create new**

     A pipeline project is automatically created for the expiring contract. The contract is displayed in the Associated Records section of the pipeline project.

   - **Add to existing**

     From the **Add to pipeline project** list, select an existing pipeline project. The contract is added to the pipeline project.

   The Contract renewal sourcing task is automatically created and appears in the **Related work** tab of the contract record. This task is assigned to the business owner who was originally assigned to the sourcing request. The shopper or business owner can view the sourcing task in Employee Center and choose whether to renew the contract or not. For more information, see Confirm contract renewal in Employee Center.

Confirm contract renewal in Employee Center

As a business owner or shopper, confirm whether the expiring contract needs to be renewed.

Before you begin

Role required: sn_shop.shopper

About this task

After a pipeline project is created from an expiring contract, a sourcing task is automatically assigned to the business owner or shopper. This task prompts them to confirm whether the expiring product or service is still needed. Based on their selection, the system either cancels the project or duplicates a sourcing request.

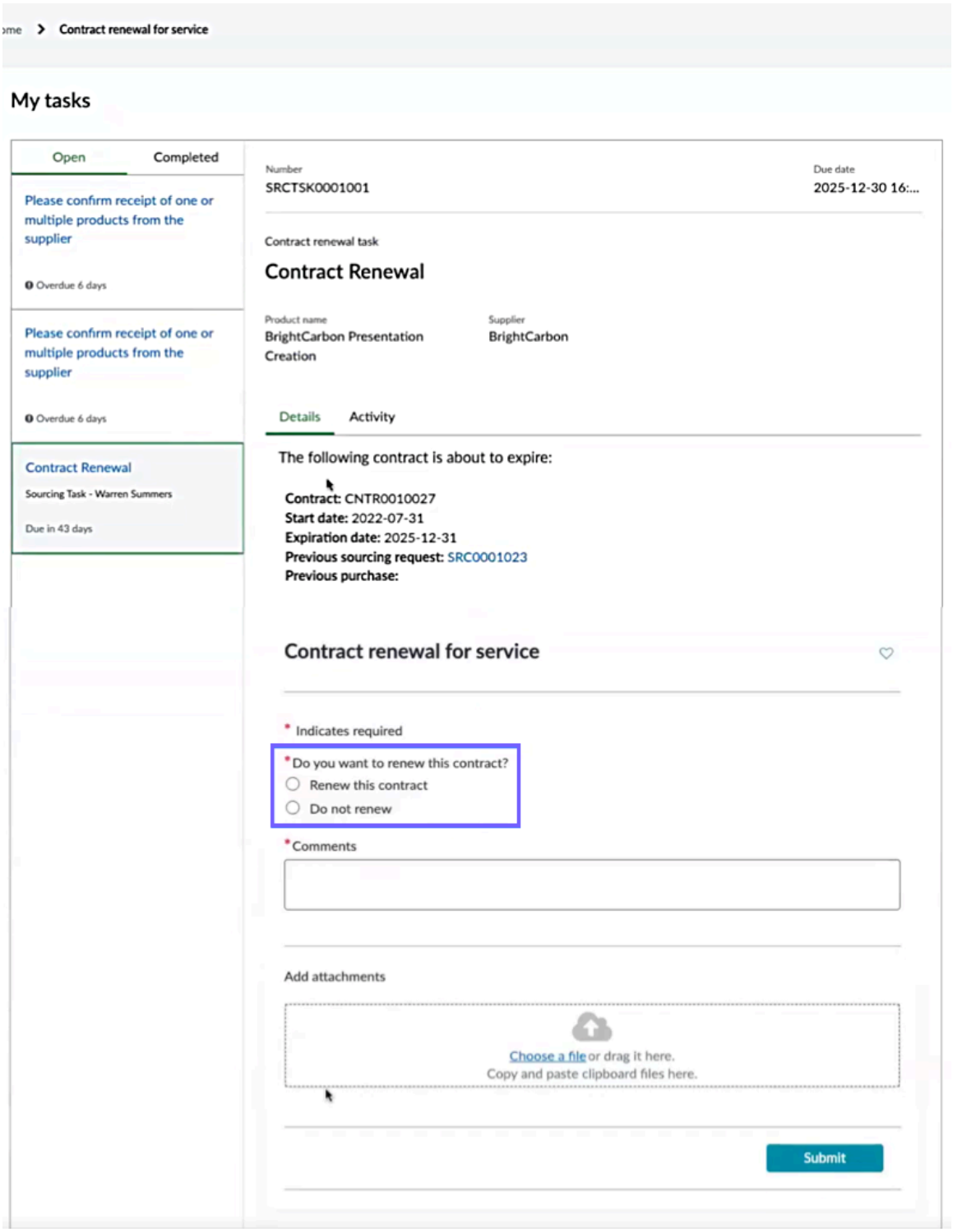
Procedure

1. Navigate to **All** > **Employee Center**.
2. Select **My Tasks**.
   The form displays the **Open** and **Completed** tabs.

   The **Open** tab lists all to-dos that have not been completed.

3. On the **Open** tab, select the contract renewal task.

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4. In the Do you want to renew this contract section, select one of the following options:
   - **Renew this contract**: The following occurs when you select this option:
     - Details from the previous request are displayed, with an option to update delivery information.
     - After the shopper selects **Submit**, a new sourcing request is created by duplicating the original request linked to the expiring contract.
     - Task completion is recorded in the Work notes of the pipeline project.
     - The new request is linked to the active pipeline project and appears under the **Overview** tab and in the Sourcing related list on the pipeline project record.

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- **Do not renew**: The following occurs when you select this option:
  - A mandatory Close notes text box is displayed.
  - The shopper enters the reason for non-renewal.
  - After the shopper selects **Submit**, the comments are saved to the **Close notes** field of the pipeline project and the Work Notes section.
  - The pipeline project is canceled.

5. Select **Submit**.

Create a Universal Request

Create a Universal Request (UR) in Employee Center when your request involves multiple departments or the right department to contact is unclear.

Before you begin

Role required: snc_internal

Procedure

1. Navigate to Employee Center.
2. In the **How can we help?** search bar, enter a description of your request in natural language. Include the services needed, relevant locations, and any additional context that helps fulfillers understand your requirements.
3. Review the search results to check whether an existing catalog item or knowledge article addresses your need.
4. If no suitable result is available, select **Request help** in the **Contact us for help** section.
5. In the Request Help form, enter the details of your request.
6. **Optional:** If the request contains sensitive or confidential information, select the **Issue contains sensitive or confidential information** check box.
   For more information on handling sensitive information, see Universal Request sensitive information security.
7. Select **Submit**.

Result

The Universal Request is created and routed to a routing agent for review. The request is then processed through the Universal Request workflow. For more information, see Universal Request.

Create a procurement case from a Universal Request

When a Universal Request arrives in the Source-to-Pay Workspace, create a linked procurement case to track and manage the request through fulfillment.

Before you begin

Role required: sn_uni_req.routing_agent and sn_uni_req.sensitiveinfo_agent

The Universal Request for Source-to-Pay Operations plugin (sn_fsc_ur_common) must be active. To activate the plugin, see Install Universal Request for Sourcing and Procurement Operations.

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon.
3. Navigate to **Universal request** > **All**.

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4. Select a Universal Request to review the case details.
5. Select **Create Case** > **Create Procurement Case**.
   The Create New Procurement Case form opens with details automatically populated from the Universal Request.
6. Select **Save**.
7. **Optional:** Select **Transfer** to move the Universal Request to a different department.
   For more information, see Transfer a primary ticket
8. **Optional:** Select **Create Associated Ticket** to request assistance from another department while keeping the current procurement case as the primary ticket.
   For more information, see Create associated ticket for primary ticket of UR.

   Note: If an associated ticket is assigned to a team whose cases are not visible to the employee, the Universal Request does not display ticket updates.

Result

A procurement case is created and linked to the Universal Request. When the procurement case moves to **In Progress** or **Closed Complete**, the Universal Request status syncs automatically based on state mapping, and the employee can track progress in Employee Center.

Purchase requisition and purchase order progress tracking

Procurement specialists and buyers use the Progress Tracker to monitor the approval and fulfillment lifecycle for purchase requisitions and purchase orders. View completed and pending workflow steps, access assigned work items, and review transition history.

The Progress Tracker displays the approval and fulfillment lifecycle for purchase requisitions (PRs) and purchase orders (POs). The stepper shows which steps have completed, which is current, and which are pending. The info card provides contextual details: assigned users, pending work items, completion dates, and — for deviation states — the reason the record diverged and the required next action.

Related topics

- View the purchase requisition Progress Tracker
- View the purchase order Progress Tracker
- Use the Progress Tracker info card

View the purchase requisition Progress Tracker

View the Progress Tracker stepper on a purchase requisition (PR) record to understand where the PR sits in its approval and sourcing workflow.

Before you begin

This role includes *sn_shop.shopper*, which the stepper's data broker requires. Without *sn_shop.procurement_specialist*, you cannot open purchase requisition records.

Role required: *sn_shop.procurement_specialist*

About this task

When you open a purchase requisition record in the Source-to-Pay Workspace, the Progress Tracker appears above the tab navigation, displaying the PR's current state in the approval-to-sourcing workflow. You can understand where the PR is without inspecting individual approval records or task lists.

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Procedure

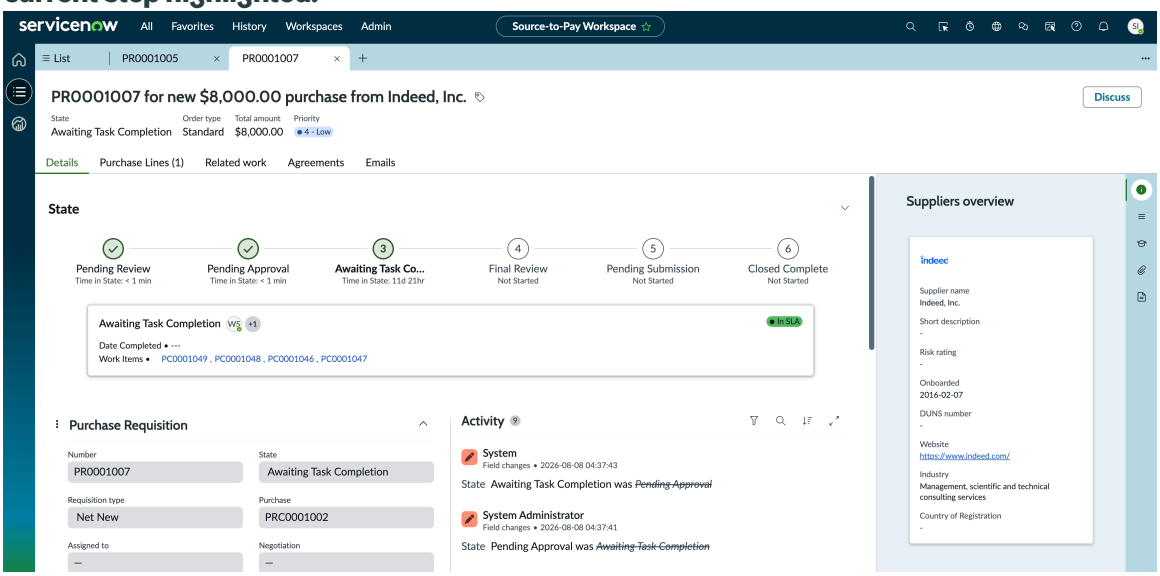
1. Open a purchase requisition record.

   In the Source-to-Pay Workspace, search for or navigate to the PR you want to monitor.

2. View the Progress Tracker stepper above the tab navigation.

   The stepper appears above the **Details**, **Purchase Lines**, **Related work**, **Agreements**, and **Emails** tabs.

   Purchase requisition Progress Tracker stepper. Purchase requisition record in the Source-to-Pay Workspace showing the Progress Tracker stepper above the tab navigation. The stepper displays six states in left-to-right order with the current step highlighted.



   The stepper shows:

   - Current state: Highlighted with a filled circle or colored indicator
   - Completed states: Marked with a green checkmark
   - Upcoming states: Shown as open circles

3. Switch between tabs to continue working.

   The Progress Tracker remains visible at the top. Whether you are viewing the **Details** tab, **Purchase Lines**, **Related work**, or any other section of the PR, the stepper stays in place above the tabs.

4. Click on a state in the stepper to expand the info card.

   The info card displays detailed information about that state. See Use the Progress Tracker info card for details on what the info card displays.

Result

You can now see where the PR stands in its workflow and understand what has been completed and what is pending.

Example:

The Progress Tracker shows Pending Review (green checkmark, completed) and Pending Approval (green checkmark, completed). The current state is Awaiting Task Completion (highlighted). Upcoming steps are Final Review, Pending Submission, and Closed Complete

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(shown as open circles). Hovering over the Awaiting Task Completion step shows Days in step: 3 and a list of pending fulfiller tasks for this PR.

What to do next

For information about the PR state model, including happy-path states and deviation branches, see Purchase requisition state model. For related PO Progress Tracker help, see View the purchase order Progress Tracker.

View the purchase order Progress Tracker

View the Progress Tracker stepper on a purchase order record to understand where the PO is in its fulfillment workflow (receipt and invoicing).

Before you begin

Without the sn_shop.procurement_specialist role, you cannot open the purchase order record. The stepper's data broker additionally requires the sn_shop.shopper role, which is already included by sn_shop.procurement_specialist.

Role required: sn_shop.procurement_specialist

About this task

Whenever you open a purchase order record in the Source-to-Pay Workspace, the Progress Tracker appears above the tab navigation. It displays the PO's current state in the receipt and invoicing workflow. This gives you a quick visual reference for understanding where the PO is in fulfillment, without having to inspect individual receipt or invoice records.

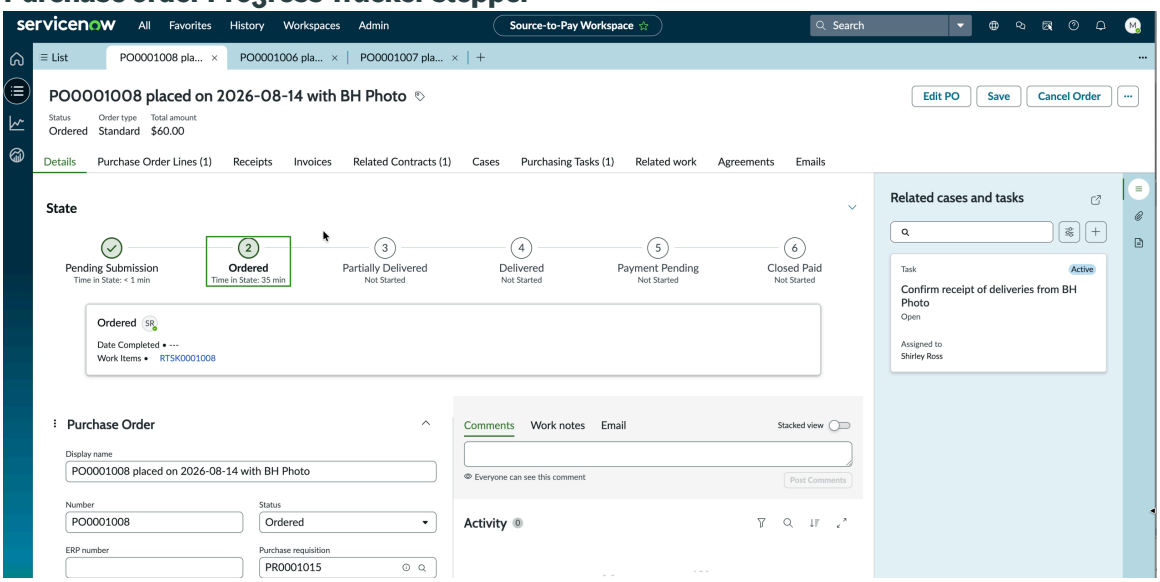
Procedure

1. In the Source-to-Pay Workspace, open a purchase order record.

   Search for or navigate to the PO you want to monitor.

2. View the Progress Tracker stepper above the tab navigation (Details, Purchase Lines, Related work, Agreements, Emails, Receipts, Invoices).

Purchase order Progress Tracker stepper



The stepper shows:

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- Current state: highlighted with a filled circle or colored indicator
- Completed states: display a checkmark icon
- Upcoming states: shown as open circles

3. Switch between tabs to continue working.

   Whether you are viewing the Details tab, Purchase Lines, Related work, Receipts, Invoices, or any other section of the PO, the stepper stays in place above the tabs.

   The Progress Tracker remains visible at the top.

4. To see detailed information about any state, select that state in the stepper.

   See Use the Progress Tracker info card for details on what the info card displays.

   The info card expands.

Result
You can see where the PO stands in its receipt and invoicing workflow and understand what has been completed and what is pending.

Example:
A procurement specialist opens purchase order PO0001008 and sees the Progress Tracker showing six states. **Pending Submission** displays a checkmark icon (completed, less than 1 minute in state). **Ordered** is highlighted with a green border as the current state (35 minutes in state). Four upcoming states appear as numbered circles: **Partially Delivered**, **Delivered**, **Payment Pending**, and **Closed Paid**. Selecting the current **Ordered** state expands the info card showing the work item RTSK0001008.

What to do next
For information about the PO state model, including happy-path states and deviation branches, see Purchase order state model. For comparison with the PR Progress Tracker, see View the purchase requisition Progress Tracker. For related configuration tasks, see Configure PR and PO Progress Tracker states.

Use the Progress Tracker info card

View detailed information about a step in the Progress Tracker by selecting the step to expand the info card.

Before you begin
Role required: sn_shop.procurement_specialist

About this task
The Progress Tracker info card provides step-by-step detail about the PR or PO journey. It shows current and completed work items, who is assigned, and when steps completed. For deviation states, it shows why the record deviated and what to do next.

Procedure

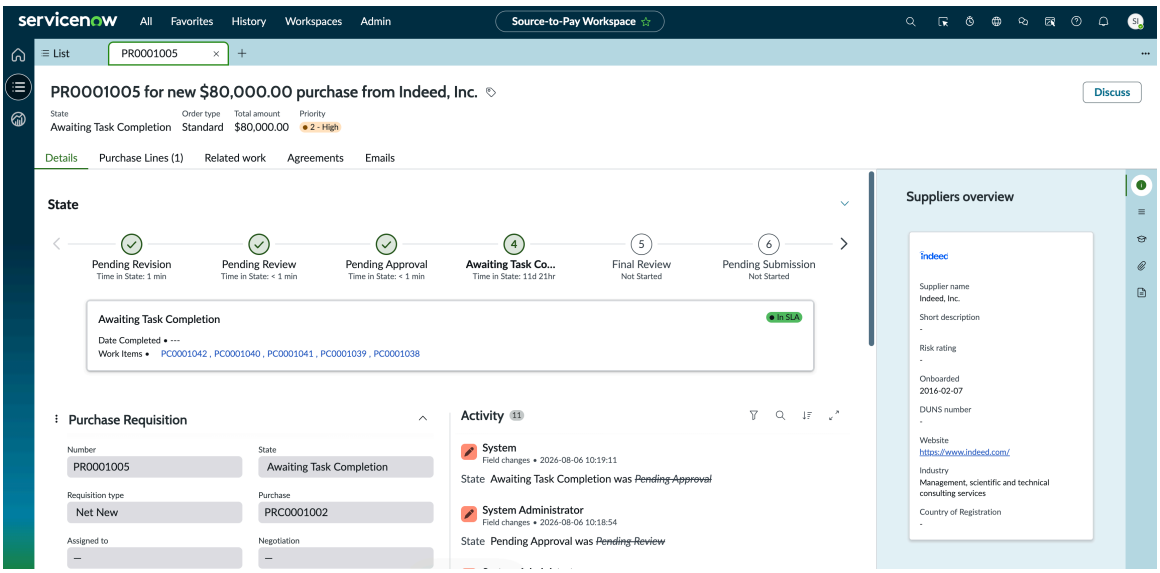
1. On a purchase requisition or purchase order record, select a step in the Progress Tracker stepper.

   Select any state label or circle in the stepper.

2. Review the info card details that appear below the stepper.

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Progress Tracker info card after selecting a stepper step. A Progress Tracker info card expanded after selecting a Pending Revision step. The card displays the state badge with assigned user avatars, an alert banner explaining the deviation, the transition history log showing previous state changes with timestamps and actors, and guidance for the next action needed to move the record forward.



The info card displays the following information depending on the current state:

- State badge and avatars—The step state and assigned users. Select the "+N" badge to view additional assignees when more than 8 exist.
- Date Completed—The date the step finished, or three dashes if still in progress.
- Work Items—Links to related tasks, approvals, or cases for that step.
- Transition history—(Shown only for deviation states) A chronological log of state changes.
- Alert banner—(Shown only for deviation states) An explanation of why the record deviated.

3. To view a specific work item, select its link in the Work Items field.

   The linked record (for example, an approval or task) opens in the same workspace tab or modal. You can navigate back to the PR or PO record to continue reviewing the Progress Tracker.

4. For deviation states, select a transition history entry to see more detail about that state change.

   A popover or detail panel appears showing the actor, timestamp, and reason for the state change. Close the detail to return to the info card.

Result

You can now see the contextual information about each step in the PR or PO progress, including assigned work, completion dates, and any deviations from the expected path.

Example:

When a PR enters the Pending Revision state, the info card displays an alert banner with the approver name, rejection date, and reason for rejection. The transition history log shows when the PR moved from Pending Approval to Pending Revision. Select the transition entry to view the approver feedback or comments on the rejection.

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What to do next

For complete information about info card fields and content model, see Progress Tracker component reference. For task help on viewing the full tracker, see View the purchase requisition Progress Tracker or View the purchase order Progress Tracker.

Configure the Progress Tracker

Procurement administrators can control whether the Progress Tracker displays on purchase requisition (PR) and purchase order (PO) records systemwide. You can customize which states appear in the stepper and control the order in which states are displayed.

Prerequisites

You must have the sn_shop.procurement_administrator role to read or modify both the Progress Tracker configuration records and the system properties that control visibility.

Control levels

By default, the Progress Tracker is enabled and displays all available states on every purchase requisition and purchase order. As a procurement administrator, you have two levels of control.

Systemwide visibility

Enable or disable whether the Progress Tracker appears on all PR or PO records using system properties. This is useful when you are performing maintenance or need to hide the tracker temporarily.

State-level customization

Customize which states appear in the stepper and their display order using the Progress Tracker configuration records. You can hide states your organization does not use and arrange states in a sequence that matches your workflow.

Required role

You must have the sn_shop.procurement_administrator role to set up and maintain the Progress Tracker to align with your organization's PR and PO workflows.

Related tasks

For more information, see the following topics.

- Configure PR and PO Progress Tracker states
- Configure Progress Tracker visibility

Configure PR and PO Progress Tracker states

Configure which states appear in the Progress Tracker, and how they flow, by editing the PR Stage Display Config and PO Stage Display Config records—no code deployment required.

Before you begin

Role required: sn_fin.finance_admin

About this task

You can customize purchase requisition (PR) and purchase order (PO) state flows without code deployment. State graphs—including happy path, terminals, deviations, and the punchout variant—are defined in configuration records rather than hardcoded in script. You can add, remove, or reorder states by editing a record's script field.

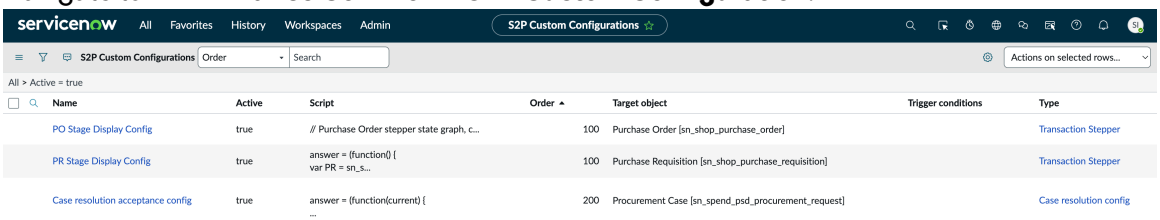
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Configuration records are separate for PR and PO. The **PR Stage Display Config** record targets Purchase Requisition objects, and the **PO Stage Display Config** record targets Purchase Order objects, so you can change one independently of the other.

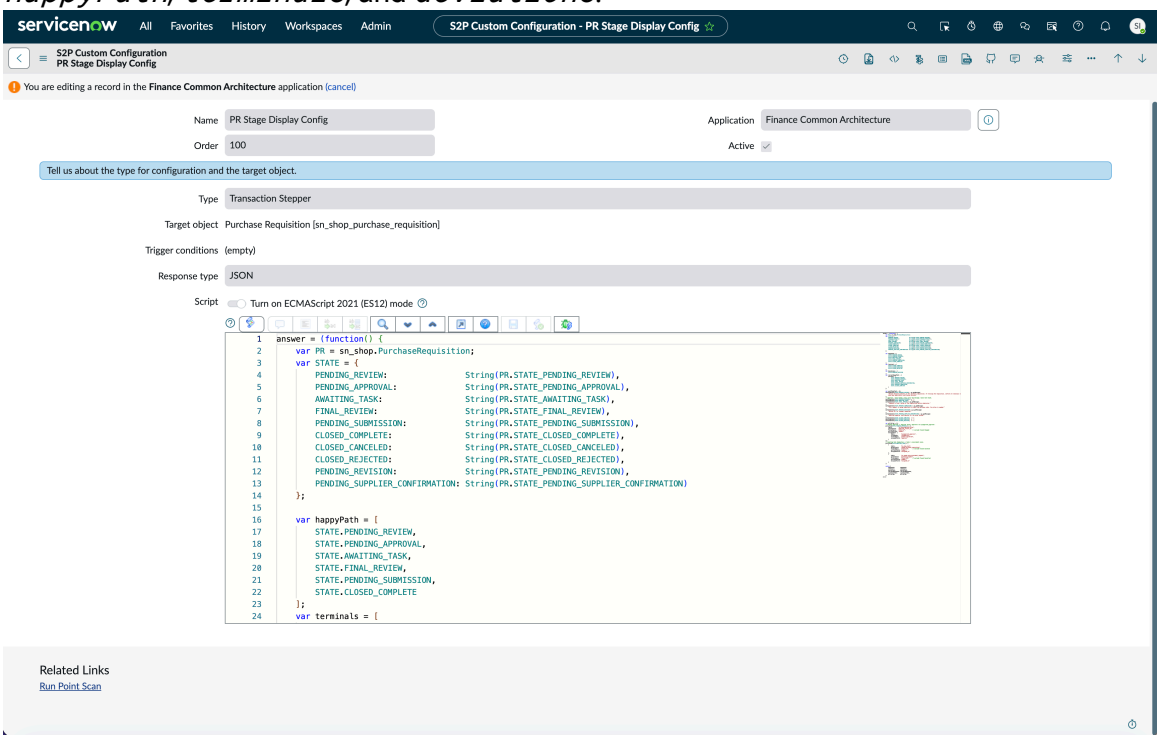
Editing the script field directly requires familiarity with ServiceNow scripts. Work with a developer if you are not comfortable editing scripts.

Procedure

1. Navigate to **All** > **Finance Common** > **S2P Custom Configuration**.



2. Open **PR Stage Display Config** to edit the PR state graph, or **PO Stage Display Config** to edit the PO state graph.
3. In the **Script** field, edit the following arrays to add, remove, or reorder states: *`STATE`*, *`happyPath`*, *`terminals`*, and *`deviations`*.



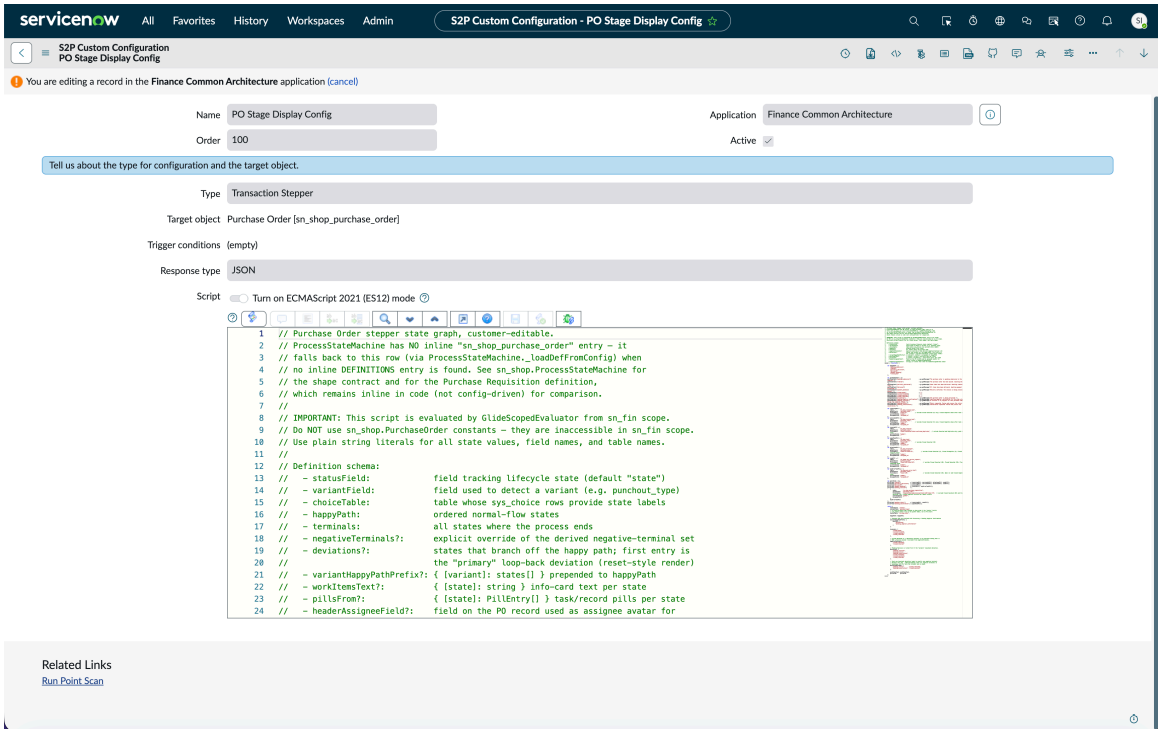
   The PR configuration also defines a punchout variant happy path (`state=10,20,30,40,100,45,50`—inserting Pending Supplier Confirmation before Pending Submission) separately from the standard happy path (`state=10,20,30,40,45,50`). For the full state reference, see the PR state model topic.

   The arrays now reflect your state flow changes.

4. For the PO configuration, edit the same graph-shaped fields, plus the PO-specific schema fields: *`statusField`*, *`variantField`*, *`choiceTable`*, *`workItemsText`*, *`pillsFrom`*, and *`headerAssigneeField`*/*`headerAssigneeStates`*.

> **Important:** The PO configuration script runs under GlideScopedEvaluator in the sn_fin scope. Use plain string literals for state values, field names, and table names—do not reference sn_shop.PurchaseOrder constants, which are not accessible in that scope.

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The PO-specific schema fields are updated.

5. Select **Update**.

   State-graph definitions are cached per transaction, so your change takes effect on the next request without a manual cache clear.

Result

The updated state graph takes effect on the next transaction for a PR or PO record. For the current state list and happy-path order, see the PR state model and PO state model topics.

Example: Remove Final Review from PR happy path

To remove Final Review from the PR happy path, delete its state value from the *happyPath* array in the PR Stage Display Config script.

Before:

```
happyPath: [10, 20, 30, 40, 45, 50]
```

After:

```
happyPath: [10, 20, 30, 45, 50]
```

The stepper shows Pending Review → Pending Approval → Awaiting Task Completion → Pending Submission → Closed Complete, skipping Final Review.

What to do next

The `ProcessStateMachine` script include reads this configuration. Its output reaches the stepper UI through the get_pr_stepper_data data broker transform (PR) and the equivalent PO data broker. Both data brokers run under an execute ACL requiring the sn_shop.shopper role for the viewing user. See the configure tracker visibility topic for system-wide visibility, and the PR state model and PO state model topics for the resulting state model.

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Configure Progress Tracker visibility

Enable or disable whether the Progress Tracker displays on purchase requisition and purchase order records system-wide.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

By default, the Progress Tracker displays on all purchase requisition (PR) and purchase order (PO) records in Source-to-Pay Workspace. You can disable the Progress Tracker system-wide for PR records, PO records, or both using system properties.

Procedure

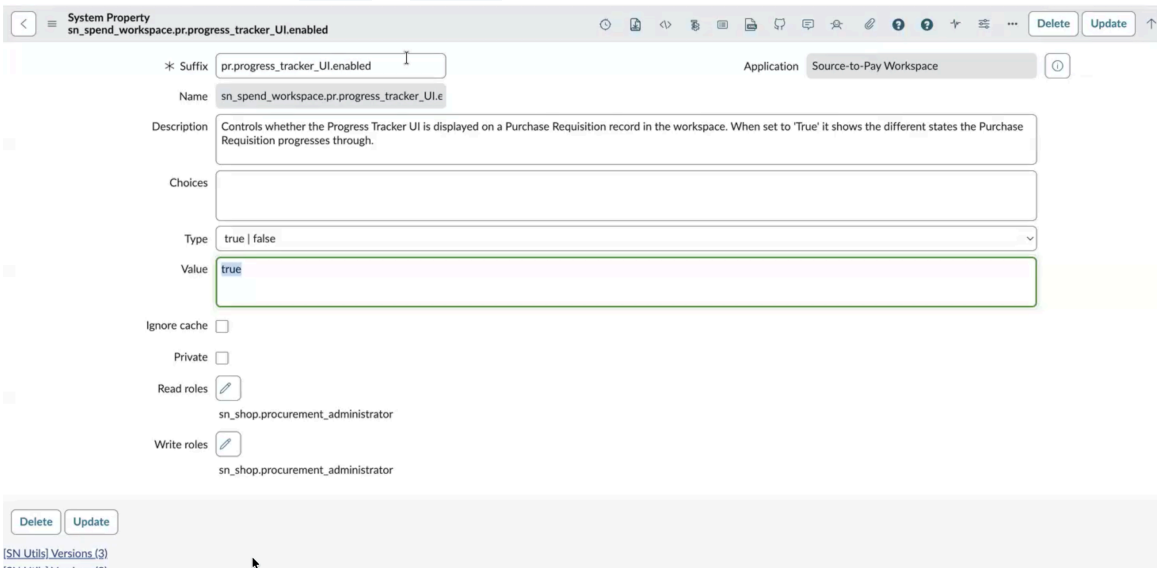
1. Navigate to **All** > **System Properties** > **All**.

   Filter for `progress_tracker` to show the PR and PO Progress Tracker system properties.

2. Open the system property for PR or PO.

   Select *`sn_spend_workspace.pr.progress_tracker_UI.enabled`* to control the PR Progress Tracker, or *`sn_spend_workspace.po.progress_tracker_UI.enabled`* to control the PO Progress Tracker.

3. In the **Value** field, enter `true` or `false`.



   - `true`—The Progress Tracker is visible on all PR or PO records.
   - `false`—The Progress Tracker is hidden on all PR or PO records.

4. Select **Update**.

   The visibility change takes effect immediately for all records.

Result

The Progress Tracker is now enabled or disabled on PR and PO records according to your system property setting.

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What to do next

To customize which states display in the Progress Tracker stepper or the order in which they appear, see Configure PR and PO Progress Tracker states. For system property reference, see System properties for Progress Tracker visibility.

Sourcing and Procurement Operations reference

Reference topics provide additional information about Sourcing and Procurement Operations, including lists, forms, rules, components, parameters, roles, and personas.

Base system procurement case type reference

Procurement Case Management provides 13 base system case types that classify procurement work.

Purchase modification cases

Purchase modification cases are initiated by a requestor or shopper from within ShoppingHub.

Purchase modification case types

Case type	Purpose	How it is created
Edit a purchase `edit_purchase`	Modify an existing purchase requisition or purchase order — for example, to change quantity, price, delivery date, or line items.	Requestor selects the edit action in ShoppingHub. The system creates a purchase modification record and the `create_procurement_case` subflow creates the case.
Return a purchase `return_purchase`	Return received goods to the supplier.	Requestor selects the return action in ShoppingHub. The system creates a purchase modification record and the `create_procurement_case` subflow creates the case.
Replace a purchase `replace_purchase`	Replace damaged, incorrect, or defective goods.	Requestor selects the replace action in ShoppingHub. The system creates a purchase modification record and the `create_procurement_case` subflow creates the case.
Edit a receipt `edit_receipt`	Correct a receiving record after goods have been received — for example, to adjust the quantity received.	Requestor selects the edit receipt action in ShoppingHub. The case is handled end-to-end by the Edit a Receipt playbook.

Compliance review cases

Compliance review cases are created automatically by the system when a purchase requisition or purchase order meets the conditions defined in the Task Generation Decision Table, or when a procurement specialist opens a case manually.

Compliance review case types

Case type	Purpose	How it is created
GL Coding Review	Verify and correct the general ledger account	Automatic — the Task Generation Decision Table

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Compliance review case types (continued)

Case type	Purpose	How it is created
`gl_coding_review`	coding on a purchase line before the order is placed.	creates the case when a purchase requisition is submitted and the GL coding review rule fires.
Budget Review `budget_review`	Confirm that sufficient budget exists for the purchase before the order is placed or sourced.	Automatic — the Task Generation Decision Table creates the case when a purchase requisition is submitted and the budget review rule fires.
Contract Review `contract_review`	Review applicable contracts before the purchase proceeds.	Automatic — the Task Generation Decision Table creates the case when a purchase requisition is submitted and the contract review rule fires.
Send NDA for Signature `send_nda`	Send a non-disclosure agreement to the supplier associated with the purchase for signature before the purchase proceeds.	Automatic — the Task Generation Decision Table creates the case when a purchase requisition is submitted and the NDA rule fires.
Delivery Address Review `delivery_address_review`	Verify and approve the delivery address on a purchase before the order proceeds. The case is created when the delivery address on the purchase requisition requires verification or company approval.	Automatic — created by the system when a purchase requisition is submitted and the delivery address on a line item requires review. Requires the Purchase Modification Content Pack (`sn_spend_cp`).
Due Diligence `due_diligence`	Conduct a supplier due diligence assessment before a purchase proceeds.	Manual — opened by a procurement specialist — or automatically via the Task Generation Decision Table during supplier qualification. The case is initially assigned to the user who creates it.

Support request cases

Support request cases are opened by employees through the Service Catalog or Employee Center to get help from the procurement organization.

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Support request case types

Case type	Purpose	How it is created
Inquiry `inquiry`	Request general support or ask a question of the procurement organization.	Employee submits the **Ask procurement** catalog item in the Service Catalog or Employee Center.
Request a Corporate Card `request_cc`	Request a corporate purchasing card for business expenses. The procurement or finance team processes the request and coordinates card issuance.	Employee initiates the request. The specific catalog item or portal entry point is configured during implementation.
Request a copy of contract `request_contract_copy`	Obtain a copy of an existing supplier contract for reference.	Employee submits the **Request a copy of contract** catalog item in the Service Catalog or Employee Center. The system links the case to the relevant contract record and populates the case description with the contract number.

Related topics

Procurement case types

Create New Pipeline Project form

Use the Create New Pipeline Project form to provide details about the pipe project.

Create New Pipeline Project form

Field	Description
Pipeline Project	
Number	An auto-generated number that uniquely identifies the pipeline project.
State	The current state of the pipeline project. Available values: • **Draft** • **Planned** • **Work in Progress** • **Closed Complete** • **Closed Canceled**
Priority	Indicates how quickly you must complete the pipeline project.
Project type	Specifies the type of project based on the sourcing objective. Available values:

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Create New Pipeline Project form (continued)

Field	Description
	• Supplier Optimization – Consolidating suppliers to reduce spend • Contract Optimization - Renegotiating an existing contract • Savings Potential – Using market intelligence to potentially lower spend • Spend Optimization – Use sourcing events (RFI, RFQ, RFP) to lower spend • Risk Reduction – Supplier issues or backup for an existing supplier
Assigned to	Person assigned to the pipeline project.
Short description	Name of the pipeline project.
Description	Description of the pipeline project.
Project summary	
Opportunity source	The source of the pipeline project. This field takes its value based on where the pipeline is created. • Intake Request: When the pipeline project is created from the Employee Center intake request. • Adhoc: When the Sourcing Manager or Procurement Specialist manually create the from the list view in Source-to-Pay Workspace. • System-generated: When the pipeline project is created by AI.
Business owner	The person who initiates the pipeline project and provides key input and approvals.
Spend category	Spend Category used to report on savings.
Business unit	The business unit associated with the pipeline project, such as IT, Finance, HR, or Sales.
Estimated start date	The projected date when the project is expected to begin.
Estimated end date	The projected completion date for the pipeline project. This field reflects the due date specified in the sourcing request. If the pipeline project is associated with multiple sourcing requests, the earliest due date among them is used.

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Create New Pipeline Project form (continued)

Field	Description
Actual start date	Actual start date of the pipeline project.
Actual end date	Actual end date of the pipeline project.
Savings start date	The date from which savings are expected to begin.
Savings end date	The date until which savings are expected to be captured.
Financials	
Estimated spend	The anticipated expenditure for the goods or services covered by the pipeline project.
Hard savings	Direct, measurable cost reductions resulting from the pipeline project.
Targeted savings	The savings goal set for the pipeline project.
Cost avoidance	Potential costs prevented through negotiation, process changes, or alternative sourcing.
Final spend	The actual amount spent at the completion of the pipeline project.
Other savings	Any additional savings achieved that don't fall under hard savings or cost avoidance categories.
Lost savings	Forecasted savings that were not realized due to delays, project cancellations, or scope changes.
Associated records	
Previous record type	The classification of the preceding project record.
Previous record ID	The unique identifier of the previous related project or sourcing record, used for reference.

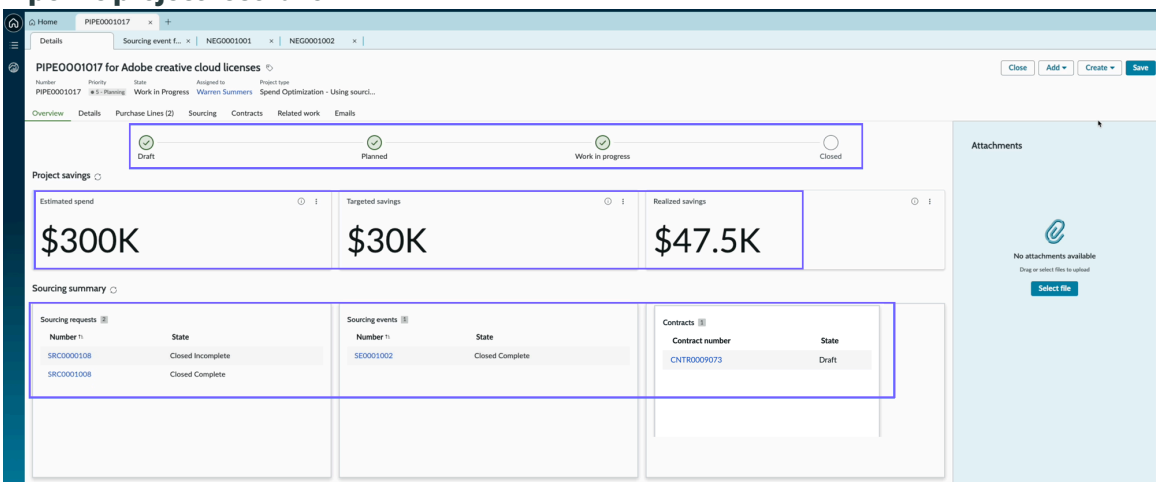
Pipeline project record tabs and UI actions

View project financial details, add existing procurement objects to pipeline projects, or create new procurement objects from the Pipeline project record form.

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Pipeline project record form

Pipeline project record form



The following table provides descriptions of the available tabs and UI actions in the Pipeline project record form.

Form component	Description
State and progress bar	Shows the current state of the pipeline project.
Tabs	
Overview	The Overview tab includes the following sections: • Project savings: Displays savings related tiles for: ○ Estimated spend: Populated from the corresponding field on the pipeline project. ○ Targeted savings: Populated from the corresponding field on the pipeline project. ○ Realized savings: Sum of Hard savings, Cost avoidance, and Other savings on the pipeline project. • Sourcing summary: Displays list views of sourcing requests, sourcing events, and contracts associated with the pipeline project.
Details	Displays all the information that you provided when creating a pipeline project.
Sourcing	Contains separate subtabs, each listing sourcing requests, sourcing events, and negotiations associated with the pipeline.
Purchase Lines	Lists the purchase lines belonging to all the associated sourcing requests.
Contracts	Contains separate subtabs, each listing draft contracts, signed contracts, and other legal documents associated with the pipeline.
Related Work	Contains separate subtabs, each listing purchasing tasks, cases, and purchasing SLAs associated with the pipeline.

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Form component	Description
	Note: If the SPO and Contract Management Pro integration is enabled, this tab also includes contract requests.
Emails	Displays a list of emails in both Draft and Sent status.
UI actions	
Add	Use this drop-down list to add existing objects to the pipeline project. Available options: • Existing sourcing request • Existing sourcing event • Existing contract
Create	Use this drop-down list to create new objects for the pipeline project. Available options: • New sourcing request • New sourcing event • New contract

Savings opportunity fields

Reference for the fields on the savings opportunity record in the Savings Opportunities (sn_spend_gen_ai_savings_opportunities) table.

Savings opportunity record fields

Field	Description	Type
Header fields		
Number	Automatically generated unique identifier for the savings opportunity record, prefixed with OPP.	String
Status	Current state of the opportunity. The available values are: • Open • Dismissed • Closed	Choice
Opportunity Value	Total estimated savings calculated by the agent, displayed with the currency code inline. For contract optimization, this is the cumulative savings over the forecast period. For renewal-and-escalation findings, this value combines both savings components.	Currency
Opportunity Type	Category of opportunity produced by the source agent: **Contract Optimization**, **Spend Optimization**, or **Supplier Optimization**.	Choice
Short description	One-line summary of the opportunity generated by the agent, describing the spend category, the product or service involved, and	String

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Savings opportunity record fields (continued)

Field	Description	Type
	the estimated savings. Used on opportunity cards in the Source-to-Pay Workspace .	
Description	Rich text field containing the full AI-generated analysis for the opportunity. The content is structured as: Opportunity Summary (narrative overview of the finding), Supplier Breakdown or equivalent spend analysis, Why This Matters (business rationale), and Recommended Actions (suggested next steps) .	HTML
Opportunity Details tab		
Savings Lever	Specific lever that produced the savings finding. The available values are: • **Price Escalations & Renewal Caps** • **Payment Terms Optimization** • **Non-preferred Supplier Spend** • **Unconsolidated Spend (Single Supplier, Multiple BU Contracts)** • **Spend Fragmentation (Multi-Supplier in a Category)** • **Off-Contract Spend**	Choice
Savings Category	Classification of the savings type, for example **Hard Savings** and **Cost Avoidance** . Used to categorize the financial impact of the opportunity.	Choice
Confidence Score	Numeric confidence value assigned by the AI model to indicate how strongly the recommendation is supported by the underlying data.	Integer
Complexity	Effort estimate to action the opportunity, calculated based on factors such as the number of suppliers or purchase orders involved, for example **Low**, **Medium**, or **High**.	Choice
Spend Categories	One or more spend categories associated with the opportunity. Access control on the table uses this field to scope opportunities to category managers who own the relevant category.	Glide list
Suppliers	One or more suppliers associated with the opportunity. For supplier optimization opportunities, this includes all suppliers identified in the fragmented or non-preferred spend pattern.	Glide list
Contracts	One or more contracts associated with the opportunity. Populated for contract optimization opportunities where the finding is derived from contract clause analysis.	Glide list
Activity & History tab		
Created	Timestamp when the opportunity was generated by the AI agent .	Date/ Time
Updated	Timestamp of the most recent update to the record, such as when the scheduled run refreshed the savings estimate.	Date/ Time
Actioned By	User who created a pipeline project from the opportunity. Populated when the opportunity status moves to **Actioned**.	Reference (sys_user)

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Savings opportunity record fields (continued)

Field	Description	Type
Actioned Date	Timestamp when the pipeline project was created from the opportunity.	Date/ Time
Pipeline Project	Reference to the pipeline project created when the opportunity is actioned.	Reference
Dismissed reason	One or more reasons selected from the dismissal checklist. Visible and populated when the opportunity status is **Dismissed**.	String
Dismissed by	User who dismissed the opportunity. Visible and populated when the opportunity status is **Dismissed**.	Reference (sys_user)
Dismissed date	Timestamp of the dismissal. Visible and populated when the opportunity status is **Dismissed**.	Date/ Time

Purchase requisition, purchase order, and sourcing request states

Purchase requisitions, purchase orders, and sourcing requests move through a series of states as they progress through the procurement lifecycle. Each state reflects the current stage of processing and determines what actions are available.

How states are determined

The state of a purchase requisition, purchase order, or sourcing request is calculated automatically based on the states of its associated lines. When a line changes state, the system recalculates and updates the parent record's state. You cannot set the state of these records directly.

When procurement cases or purchasing tasks are associated with a record, the state reflects whether those items are still open. For example, a purchase requisition remains in the Awaiting Task Completion state until all order-dependent cases and tasks are closed.

Purchase requisition states

The following table describes each purchase requisition state, when the state is set, and where the purchase requisition can move from that state.

Purchase requisition states

State	When this state is set	Next state
Pending Review	Set when the purchase requisition is first created, or when any purchase requisition line requires review. This is the initial state for all purchase requisitions.	• Pending Approval • Awaiting Task Completion • Closed Canceled • Closed Rejected

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Purchase requisition states (continued)

State	When this state is set	Next state
Pending Approval	Set when all purchase requisition lines have completed review and are awaiting approval. No lines remain in the Pending Review state.	• Awaiting Task Completion • Final Review • Closed Rejected
Awaiting Task Completion	Set when all purchase requisition lines have cleared review and approval (none remain in Pending Review or Pending Approval), at least one line is in an approved state, and one or more order-dependent procurement cases or purchasing tasks are still open. Lines in a Pending Cancellation or Pending Revision state may also exist alongside approved lines without preventing this state from being set.	Final Review (when all blocking cases and tasks are closed)
Final Review	Set when all purchase requisition lines have cleared review and approval, at least one line is approved, no open cases or tasks are blocking, and the purchase requisition has not yet been submitted. The purchase requisition is ready for submission.	• Pending Submission (when buyer submits for non-punchout suppliers) • Pending Supplier Confirmation (when buyer submits for punchout suppliers) • Pending Revision (if a revision is triggered)
Pending Submission	Set when the purchase requisition has been approved and submitted, and a purchase order is being created or processed. This is an intermediate state during order creation.	• Closed Complete (when the order is fulfilled) • Closed Canceled (if canceled before ordering)

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Purchase requisition states (continued)

State	When this state is set	Next state
Pending Supplier Confirmation	Set when the associated purchase order has been submitted to the supplier and the system is waiting for an explicit supplier acknowledgment. The purchase requisition reflects this state while the supplier acknowledgment is awaited. **Note:** Unlike other purchase requisition states, this state is not derived from purchase requisition line statuses. It is set directly at the point of purchase order creation for punchout suppliers.	• Pending Submission (if not confirmed) • Closed Complete (when confirmed and fulfilled)
Pending Cancellation	Set when a cancellation has been requested for the purchase requisition and one or more lines are awaiting cancellation confirmation.	Closed Canceled (when cancellation is confirmed)
Pending Revision	Set when a buyer or procurement specialist triggers a revision of the purchase requisition and one or more lines are in revision. No lines are in a higher-priority state.	Pending Review (when the revised purchase requisition is resubmitted)
Closed Complete	Set when all approved purchase requisition lines have reached a closed complete state. Lines that were canceled or rejected during the process do not need to be in this state for the purchase requisition to close.	Not applicable. This is the last state.
Closed Canceled	Set when all purchase requisition lines have been canceled and no lines remain in an active state.	Not applicable. This is the last state.
Closed Rejected	Set when all purchase requisition lines have been rejected. When the primary line is rejected, all associated lines are also set to rejected.	Not applicable. This is the last state.

Purchase order states

The following table describes each purchase order state, when the state is set, and where the purchase order can move from that state. Purchase order states are calculated based on the states of the associated purchase order lines.

Purchase order states

State	When this state is set	Next state
Processing	Set when the purchase order is being generated or processed by an automated integration, such as an ERP system. This is an intermediate state while external processing completes.	Pending Submission (when processing is complete)

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Purchase order states (continued)

State	When this state is set	Next state
Pending Revision	Set when the purchase order has been revised through a purchase modification case and is awaiting resubmission to the supplier.	Pending Submission (when the revision is resubmitted)
Pending Submission	Set when purchase order lines are ready to be transmitted to the supplier. Entered from Processing when ERP processing completes, or from Pending Revision after a revision is resubmitted.	• Ordered (when submission is confirmed) • Pending Supplier Confirmation (if supplier acknowledgment is required)
Pending Supplier Confirmation	Set when the purchase order has been submitted to the supplier and the system is waiting for an explicit supplier acknowledgment before the order is treated as confirmed.	Ordered (when the supplier confirms)
Ordered	Set when all purchase order lines have been submitted and confirmed by the supplier, or auto-confirmed. No lines are pending, in revision, or partially delivered.	• Partially Delivered • Delivered (as goods or services are received)
Partially Delivered	Set when some purchase order lines have been received and others are still in an ordered state, or when at least one line is explicitly partially delivered.	Delivered (when all lines are received)
Delivered	Set when at least one purchase order line has been delivered and no lines remain in an active or in-progress state (such as Ordered, Processing, or Pending Submission). Lines that have already progressed beyond delivery, such as those in Payment Pending or Closed Paid, do not prevent this state from being set. The purchase order is awaiting invoice processing for the remaining delivered lines.	• Payment Pending (when an invoice is created) • Closed Released (if no invoice is required)
Payment Pending	Set when an invoice has been received and matched to the purchase order, and payment is pending. This state is only entered when every line on the purchase order is in the Payment Pending state. If any line remains in a different state, the purchase order reflects that line's state instead.	Closed Paid (when the invoice is paid)

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Purchase order states (continued)

State	When this state is set	Next state
Pending Return	Set when a return is confirmed with the supplier and the return playbook progresses to the shipping coordination stage. This state is set directly as part of the return playbook, not through the automated state recalculation from line states. When purchase order lines are in Pending Return, the automated state calculator does not update the purchase order status, and the purchase order header retains its previous state until the playbook advances.	• Closed Returned (when the return is processed) • Ordered (if the return is reversed)
Pending Cancellation	Set when a cancellation has been requested for the purchase order but has not yet been confirmed.	• Closed Canceled (when cancellation is confirmed) • Ordered (if the cancellation is reversed)
Closed Paid	Set when the invoice has been paid and all purchase order lines are in a paid state.	Closed Released (after final reconciliation)
Closed Returned	Set when all returned lines have been processed and the return is complete. This state requires every line on the purchase order to be in the Closed Returned state with no lines in any other state. A purchase order with a mix of Closed Returned and Closed Canceled lines, for example, will not enter this state automatically.	Not applicable. This is the last state.
Closed Released	Set when the purchase order has been fully closed and released after successful fulfillment and payment.	Not applicable. This is the last state.
Closed Canceled	Set when the purchase order has been canceled and all active lines are in a canceled state.	Not applicable. This is the last state.

Sourcing request states

The following table describes each sourcing request state, when the state is set, and where the sourcing request can move from that state. Sourcing request states reflect the current stage of the sourcing process, from initial review through supplier bid evaluation and award.

Sourcing request states

State	When this state is set	Next state
Pending Review	Set when the sourcing request is first created. This is the initial state for all sourcing requests. Also re-entered when a purchase requisition line reverts to a pending review state, or when the primary line's approval cascades a pending review state to all other lines on the sourcing request.	• Pending Approval • Information Needed

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Sourcing request states (continued)

State	When this state is set	Next state
Pending Approval	Set when the sourcing request has been submitted for procurement manager approval and at least one purchase requisition line is awaiting approval.	• Pending Review (when approved and cascaded to lines) • Closed Rejected (when rejected)
Information Needed	Set when the buyer requires more information from the requester before the sourcing request can proceed.	Pending Review (when the required information is provided)
Qualification Needed	Set when supplier or item qualification is required before bids can be solicited.	Qualified (when qualification is complete)
Qualified	Set when qualification is complete and the sourcing request is ready for negotiation setup. Also set during the active negotiation phase when a negotiation event exists but the negotiation has not yet advanced beyond the qualification stage for all lines. In this case, the sourcing request re-enters this state from Negotiation in Progress, not from the initial qualification step.	Pending Negotiation
Pending Negotiation	Set when a negotiation event has been created for the sourcing request but has not yet opened for bidding.	Negotiation in Progress (when the negotiation event opens)
Negotiation in Progress	Set when a negotiation event is active and supplier bids are being collected. Also set when pricing has been obtained but a negotiation event is not yet fully completed.	• Awaiting Supplier Response • Pending Resubmission
Pending Resubmission	Set when bids have been received but the negotiation event requires suppliers to resubmit revised bids.	Awaiting Supplier Response (when the resubmission round closes)
Awaiting Supplier Response	Set when the negotiation event has closed and the system is waiting for supplier bid responses to be evaluated.	• Requires Decision • Closed No Decision

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Sourcing request states (continued)

State	When this state is set	Next state
Awaiting Task Completion	Set when pricing has been obtained but one or more active sourcing-dependent procurement cases or purchasing tasks are still open against the sourcing request. The state is updated automatically when all blocking cases and tasks are closed.	• Requires Decision (when all blocking cases and tasks are closed and no negotiation event is linked to the sourcing request) • Negotiation in Progress (when all blocking cases and tasks are closed and a negotiation event is linked)
Requires Decision	Set when pricing has been obtained, no active negotiation event is blocking the sourcing request, and no open cases or tasks remain. A buyer decision is required to award or decline the sourcing.	• Closed Complete (when the award is accepted) • Closed No Decision • Closed Canceled
Closed Complete	Set when the sourcing request has been awarded and closed. All pricing has been accepted and the sourcing outcome has been converted, typically to a purchase order.	Not applicable. This is the last state.
Closed No Decision	Set when the sourcing request is closed without a sourcing decision being made. All purchase requisition lines have reached a closed no decision state.	Not applicable. This is the last state.
Closed Canceled	Set when the sourcing request has been canceled. All active purchase requisition lines are in a canceled state.	Not applicable. This is the last state.
Closed Rejected	Set when all purchase requisition lines on the sourcing request have been rejected. When the primary line is rejected, all other lines on the sourcing request are also set to rejected. In workflows where individual line selection is supported (such as the mobile supplier selection experience), rejecting individual lines does not move the sourcing request to Closed Rejected until every line has been rejected.	Not applicable. This is the last state.

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Related topics

- Purchase requisition
- Purchase order
- Sourcing request

Purchase requisition state model

Reference for the complete purchase requisition (PR) state model, including the standard progression sequence and alternative progression branches that a PR can follow.

Happy-path sequence

The standard path a PR follows from creation to closure.

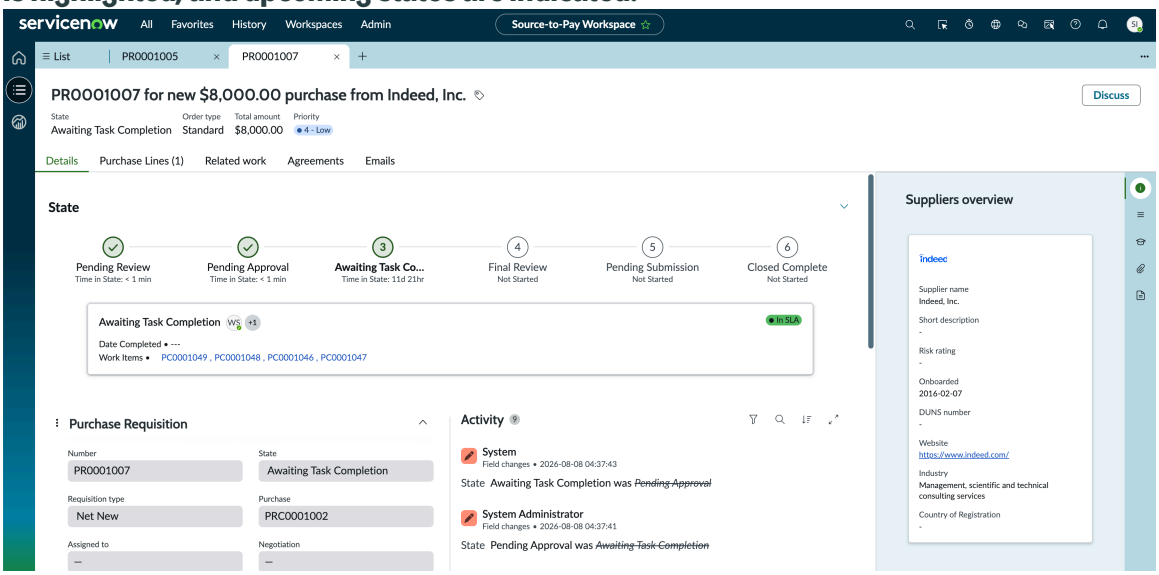
- Pending Review
- Pending Approval
- Awaiting Task Completion
- Final Review
- Pending Submission
- Closed Complete

For punchout PRs, the sequence includes an additional state:

- Pending Review
- Pending Approval
- Awaiting Task Completion
- Final Review
- Pending Supplier Confirmation
- Pending Submission
- Closed Complete

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Purchase requisition Progress Tracker happy path. Progress Tracker displaying the happy-path sequence. Completed states show checkmarks, the current state is highlighted, and upcoming states are indicated.



Deviation branches

Deviation branches for cases where a PR does not follow the happy path.

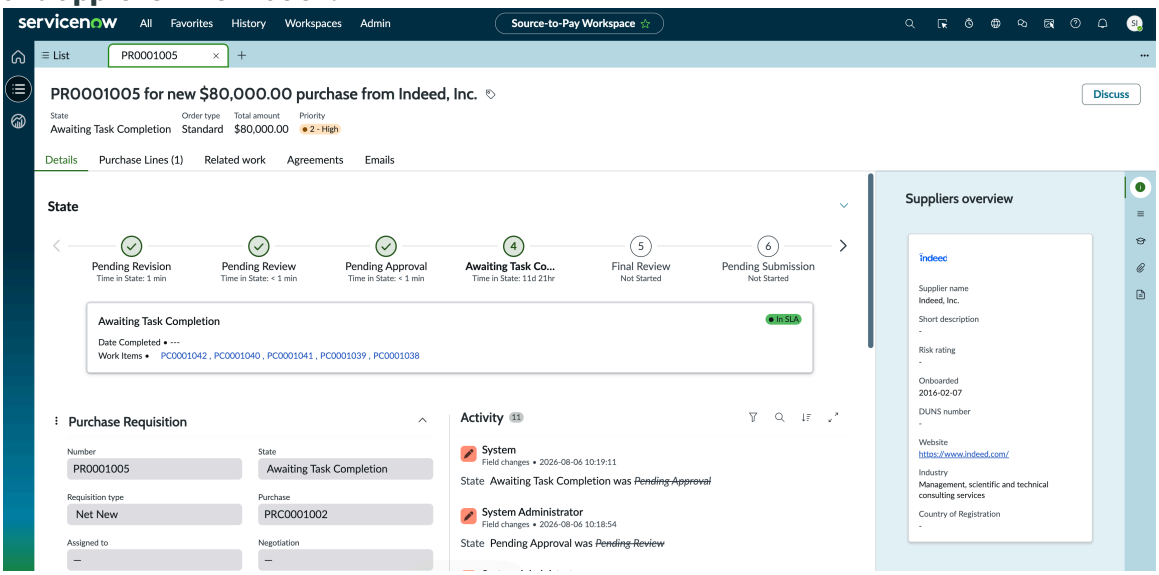
Purchase requisition deviation branch states

State	Description
Pending Revision	Entered from Pending Review or Pending Approval when an approver rejects the PR because it does not meet requirements. From Pending Revision, the PR can loop back to Pending Review once the requestor makes the required changes.
Closed Rejected	A terminal state reached from Pending Review, Pending Approval, or Final Review when the PR is rejected. The PR cannot transition out of Closed Rejected.
Closed Canceled	A terminal state reached from multiple points when the PR is canceled. The PR cannot transition out of Closed Canceled. The underlying test suite covers both a buyer-initiated and a shopper-initiated cancellation path. Both terminate at Closed Canceled. The tracker does not currently distinguish who canceled the PR.
Pending Cancellation	Not modeled as a distinct state on purchase requisitions. A PR that is canceled transitions directly to Closed Canceled with no intermediate "pending" step. The purchase order state model does define a distinct Pending Cancellation alternative progression. For details, see Purchase order state model.
Pending Supplier Confirmation	Punchout PRs only. This state is part of the punchout variant standard progression. The state is entered after Final Review and before Pending Submission. The PR waits for the supplier to confirm the punchout order.

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Each step in the stepper payload carries one of four status values: `done`, `current`, `upcoming`, or `terminal_negative` (used for Closed Rejected and Closed Canceled).

Purchase requisition Progress Tracker deviation branches. Progress Tracker showing a deviation branch to Pending Revision. An alert banner explains the rejection reason. The transition history log records the state change with date and approver information.



State definitions

Purchase requisition states and entry conditions

State	Entered when...
Pending Review	The PR is created and awaits initial review.
Pending Approval	Initial review is complete and the PR is routed to approvers.
Awaiting Task Completion	Approval is granted and fulfiller tasks (for example, source creation, contract review) are generated.
Final Review	All fulfiller tasks are complete and the PR awaits final acceptance.
Pending Submission	Final review is passed and the PR is ready to be submitted to the supplier (for example, as a PO or punchout flow).
Closed Complete	The PR has been submitted and all post-submission tasks (receipt, invoicing) are complete.
Pending Revision	An approver has rejected the PR, requiring rework.
Closed Rejected	An approver has rejected the PR at a stage where rejection is terminal (no further revision is allowed).
Closed Canceled	The PR has been canceled by a system administrator or authorized user.
Pending Supplier Confirmation	Punchout PRs only. The punchout order has passed Final Review and is awaiting the supplier's confirmation before moving to Pending Submission.
Pending Cancellation	Not modeled for purchase requisitions. A canceled PR goes directly to Closed Canceled. This is a purchase order-only

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Purchase requisition states and entry conditions (continued)

State	Entered when...
	alternative progression. For details, see Purchase order state model.

Info card and work items

For each PR state, the Progress Tracker info card displays different work items and assignment sources. For the complete field reference and state-specific content, see Progress Tracker component reference.

Purchase order state model

The purchase order state model defines the happy-path sequence and deviation branches that a PO follows from creation to closure.

Happy-path sequence

The standard path a PO follows from creation to payment closure.

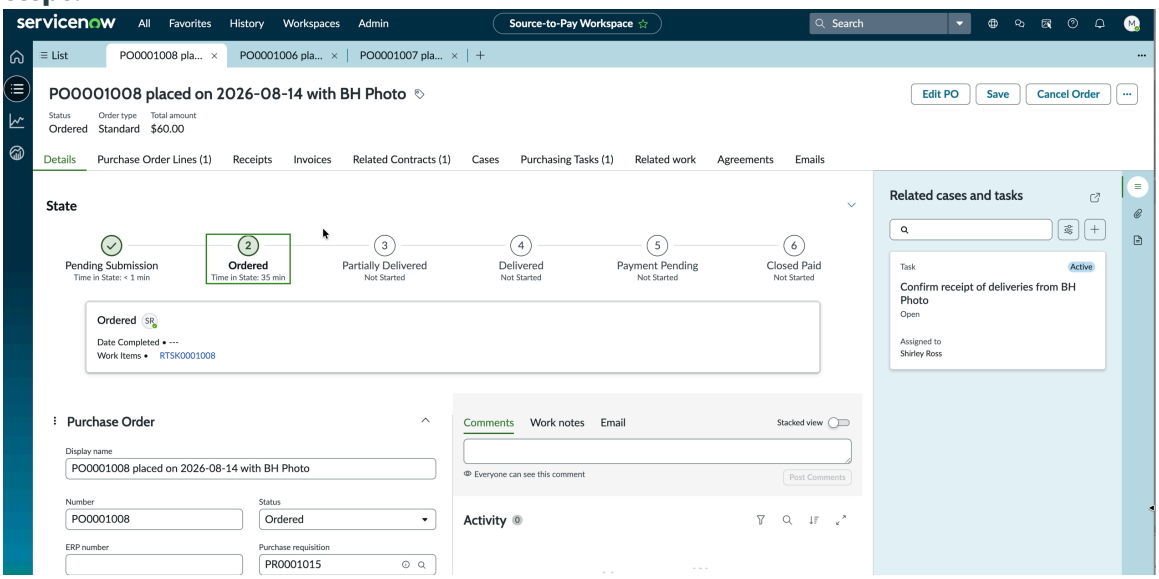
- Pending Submission
- Ordered
- Partially Delivered
- Delivered
- Payment Pending
- Closed Paid

For punchout POs, two additional states are included:

- Processing
- Pending Supplier Confirmation
- Pending Submission
- Ordered
- Partially Delivered
- Delivered
- Payment Pending
- Closed Paid

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Purchase order Progress Tracker happy path. A purchase order record in the Source-to-Pay Workspace showing the Progress Tracker stepper with Pending Submission marked complete and Ordered as the current step, followed by Partially Delivered, Delivered, Payment Pending, and Closed Paid as upcoming steps.



Deviation branches

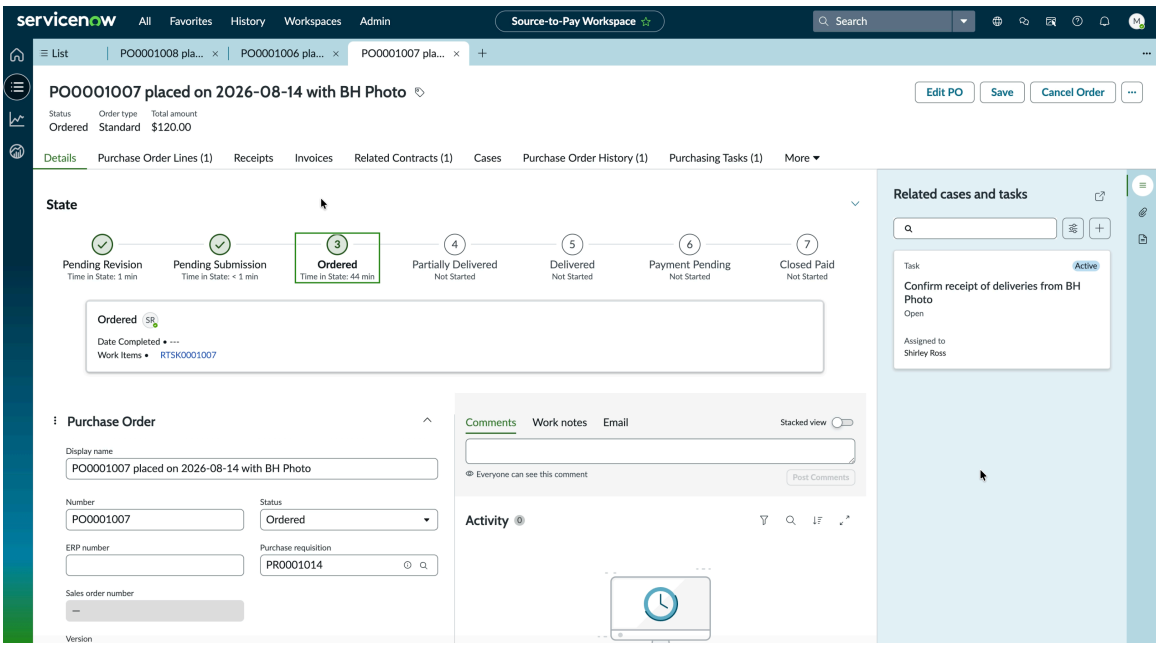
Deviation branches for cases where a PO does not follow the happy path. Unlike the purchase requisition state model, purchase orders have three distinct deviation paths, each with its own terminal state.

Purchase order deviation branch states

State	Description
Pending Revision	The primary loop-back deviation. Rendered as a completed step before Pending Submission after the PO loops back through it, the same way Pending Revision renders on a purchase requisition.
Pending Return	Terminates at Closed Returned. A secondary, un-positioned deviation — unlike Pending Revision, this state is not rendered as a loop-back step in the happy-path sequence.
Pending Cancellation	Terminates at Closed Canceled. A secondary, un-positioned deviation, same as Pending Return.
Closed Released	An alternate, non-failure terminal — explicitly excluded from *`negativeTerminals`* in the configuration, unlike Closed Canceled and Closed Returned.

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Purchase order Progress Tracker deviation branches. A purchase order record showing the Progress Tracker with Pending Revision rendered as a completed loop-back step before Pending Submission, Pending Submission and Ordered also completed/current, and the remaining happy-path steps upcoming. This demonstrates the same loop-back rendering pattern used for the PR Pending Revision deviation.



State definitions

Purchase order states and entry conditions

State	Entry condition
Pending Submission	The PO is created and awaits submission to the supplier.
Ordered	The PO is submitted to the supplier.
Partially Delivered	Some line items are delivered.
Delivered	All line items are delivered.
Payment Pending	Delivery is complete and the PO awaits payment processing.
Closed Paid	Payment is complete and the PO is closed. The happy-path terminal.
Processing	Punchout POs only. Precedes **Pending Supplier Confirmation** in the punchout variant happy path.
Pending Supplier Confirmation	Punchout POs only. The punchout order awaits the supplier's confirmation before moving to **Pending Submission**.
Pending Revision	The primary loop-back deviation. For entry conditions and terminal states, see Deviation branches.
Pending Return	A secondary deviation that terminates at **Closed Returned**. For entry conditions and terminal states, see Deviation branches.
Pending Cancellation	A secondary deviation that terminates at **Closed Canceled**. For entry conditions and terminal states, see Deviation branches.

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Purchase order states and entry conditions (continued)

State	Entry condition
Closed Released	An alternate, non-failure terminal. For entry conditions and terminal states, see Deviation branches.
Closed Canceled	A negative terminal reached from **Pending Cancellation**.
Closed Returned	A negative terminal reached from **Pending Return**.

State model differences

The PR and PO state models are distinct and not synchronized. A PR moves through approval and sourcing steps, while a PO moves through receipt and invoicing steps. The Progress Tracker renders different stepper paths for each record type. For the PR state model, see Purchase requisition state model. For related configuration, see Configure PR and PO Progress Tracker states.

Info card work items

For each PO state, the Progress Tracker info card displays different work items and assignment sources (for example, receipt tasks, invoice tasks, procurement cases). See Progress Tracker component reference for the complete field reference and state-specific content model.

SPO and Asset Management data model mappings

Describes the data model and state synchronization between SPO and Asset Management for purchase orders, purchase requisitions,sourcing requests, shipments, and receipts.

SPO PO field mappings to Asset Management PO

Lists the field mappings between SPO purchase order (PO) records and Asset Management purchase order (PO) records.

Fields in the SPO PO record align to fields in the Asset Management PO and purchase order line (POL) data model. The latest record in SPO takes precedent over legacy fields, with the exception of product model. Data flows from Asset Management PO to SPO PO or SPO purchase requisition (PR) records.

SPO Record	SPO Parent Field	SPO Child Field	Corresponding Asset Management PO Field	Corresponding Asset Management POL Field
PO	Total Amount	N/A	Total Cost	N/A
PO	Vendor	N/A	Supplier	N/A
PO	Requested Delivery	N/A	Requested Delivery	N/A
PO (POL)	N/A	Supplier	N/A	Vendor
PO (POL)	N/A	Supplier Part Number	N/A	Part Number
PO (POL)	N/A	Requested Delivery Date	N/A	Expected Delivery
PO (POL)	N/A	Purchased Quantity	N/A	Ordered Quantity

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SPO Record	SPO Parent Field	SPO Child Field	Corresponding Asset Management PO Field	Corresponding Asset Management POL Field
PO (POL)	N/A	Unit Price	N/A	Cost
PO (POL)	N/A	Total Line Amount	N/A	Total Cost
PO (POL)	N/A	Delivery Location	Ship To	N/A
PO (POL)	N/A	Received Quantity	N/A	Received Quantity
PO (POL)	N/A	Remaining Quantity	N/A	Remaining Quantity
PO (POL)	N/A	Short Description	N/A	Short Description
PO (POL)	N/A	Shipment Details.Carrier	N/A	Shipment.Shipping Carrier
PO (POL)	N/A	Shipment Details.Tracking Number	N/A	Shipment.Tracking Number
PO (POL)	N/A	Shipment Details.Actual Shipment Date	N/A	Shipment.Ship Date

SPO PO state mappings to Asset Management PO

Lists the state mappings between SPO purchase order (PO) records and Asset Management purchase order (PO) records.

State alignment between SPO PO records and Asset Management PO follows the mappings in this table, with the SPO PO driving the state behavior. SPO PO and purchase order line (POL) states drive all states except for delivered and partially delivered, which reference receiving actions in Asset Management.

SPO Record	State	State on Asset Management PO
PO	Ordered	Ordered
PO	Partially Delivered	Pending Delivery or Ordered (depending on whether Advanced Shipment Notification (ASN) is implemented. If ASN is enabled, assets move to "In Transit" and the Asset Management PO remains in the "Pending Delivery" state.)
PO	Delivered	Received
PO	Closed Cancel	Closed Cancel
PO	Closed Paid	Closed Complete
PO	Pending Submission	Ordered
PO	Payment Pending	Received
PO	Processing	Ordered
POL	Ordered	Ordered

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SPO Record	State	State on Asset Management PO
POL	Partially Delivered	Pending Delivery or Ordered (depending on if ASN is implemented)
POL	Delivered	Received
POL	Closed Cancel	Cancelled
POL	Closed Paid	Received
POL	Pending Cancellation	Ordered
POL	Pending Submission	Ordered
POL	Payment Pending	Received
POL	Processing	Ordered

SPO PR field mappings to Asset Management PO

Lists the field mappings between SPO purchase requisition (PR) records and Asset Management purchase order (PO) records.

Fields in the SPO PR record align to fields in the Asset Management PO and purchase order line (POL) data model. The latest record in SPO takes precedent over legacy fields, with the exception of product model. Data flows between the SPO records and Asset Management PO in both directions.

SPO Record	SPO Parent Field	SPO Child Field	Corresponding Asset Management PO Field	Corresponding Asset Management POL Field
PR	Supplier	N/A	Vendor	N/A
PR	Total Amount	N/A	Total Cost	N/A
PR (PRL)	N/A	Purchased Quantity	N/A	Ordered Quantity
PR (PRL)	N/A	Negotiated Unit Price	N/A	Cost
PR (PRL)	N/A	Delivery Location.Location	Ship To	N/A
PR (PRL)	N/A	Total line amount	N/A	Total Cost

SPO PR state mappings to Asset Management PO

Lists the state mappings between SPO purchase requisition (PR) records and Asset Management purchase order (PO) records.

State alignment between SPO PR records and Asset Management PO follows the mappings in this table. SPO PO states take precedent over PR states. SPO PR states take precedent over SR states.

SPO Record	State	State on Asset Management PO
PR	Closed Canceled	Closed Cancel
PR	Closed Rejected	Closed Cancel

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SPO Record	State	State on Asset Management PO
PR	Any other state	Requested

SPO SR field mappings to Asset Management PO

Lists the field mappings between SPO sourcing request (SR) records and Asset Management purchase order (PO) records.

The SR initiates the sourcing workflow, and quantity, price, and delivery location mappings defined at the SR line level are carried into the purchase requisition (PR).

These same PR line mappings are reused to create purchase order line (POL) records after supplier award, automatically populating the **Quantity**, **Price**, and **Delivery Address**/**Ship To** fields.

SPO SR state mappings to Asset Management PO

Lists the state mappings between SPO sourcing request (SR) records and Asset Management purchase order (PO) records.

State alignment between SPO SR records and Asset Management PO follows the mappings in this table. SPO PO states take precedent over PR states. SPO PR states take precedent over SR states. If any SPO purchase requisition lines (PRLs) are rejected, the Asset Management purchase order lines (POLs) in sourcing flow (suppliers that are not awarded) are updated to Closed Cancel state.

SPO Record	State	State on Asset Management PO
SR	Closed Rejected	Closed Cancel
SR	Closed Canceled	Closed Cancel
SR	Closed No Decision	Closed Cancel
SR	Any other state	Requested

Asset Management shipment field and state mappings to SPO

Lists the field and state mappings between Asset Management Shipment records and SPO Shipment records.

Field mappings

Shipment records created in asset management have corresponding readN/Aonly records created on the SPO shipment details table. Asset Management shipment state mappings are driven by the Asset Management shipment table, which contains conditional logic. The SPO shipment table is readN/Aonly.

Field on Asset Management Shipment Table	Field on SPO Shipment Table
Shipping Carrier (POL)	Shipment Details.Carrier (SPO POL)
Ship Date (POL)	Shipment Details.Actual Shipment Date (SPO POL)
Tracking Number (POL)	Shipment Details.Tracking Number (SPO POL)
Location (POL)	N/A

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Field on Asset Management Shipment Table	Field on SPO Shipment Table
Terms (PO)	N/A
Shipment Rate (PO)	N/A
Ship Date (POL)	Actual Shipment Date (SPO POL)

State mappings

State on Asset Management Shipment Table	State on SPO Shipment Table
In Transit	Out for Delivery
Delivered	Delivered

Asset Management receipt field mappings to SPO receipt records

Lists the field mappings between Asset Management receipt line records and SPO receipt records.

SPO receipt is auto-generated in the background after receipt of any items. Based on the Asset Management data model, the Asset Management receipt line field corresponds to the equivalent of SPO receipt. The Asset Management receiving slip can contain multiple receiving lines. SPO receipt is read-only, with data captured from the Asset Management purchase order (PO) whenever the Asset Management receiving experiences are active.

Asset Management Receipt Line Fields	SPO Receipt Fields
Asset Management Purchase Order Line	SPO Purchase Order Line
Quantity	Quantity Received
N/A	Type = Default or "Good Receipt"
Received By	Received By
N/A	Supplier Product (based on POL)

Primary data tables for Sourcing and Procurement Operations

The primary data tables for Sourcing and Procurement Operations store important information about products, attributes, pricing, approvals, payment terms, shipping methods, delivery locations, and job codes.

Fixed Asset [sn_fin_fixed_asset] table

The Fixed Asset [sn_fin_fixed_asset] table stores information related to: Fixed assets purchased from suppliers.

This table contains the following fields.

Fixed Asset table

Field	Data type	Description
Number	String	System-generated value that uniquely identifies this fixed asset.
ERP asset number	String	Value generated within an ERP system to uniquely identify this fixed asset.

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Fixed Asset table (continued)

Field	Data type	Description
Display name	String	System-generated name that uniquely identifies this fixed asset.
Status	Choice	Status of the fixed asset. The options are Submitted, Success, or Pending Deletion.
Supplier	Reference	Supplier from whom this fixed asset was purchased.
Product name	String	Product that was purchased.
Capitalize on	Date	Date on which the fixed asset was created within the ERP system.
Original value	Currency	Amount originally paid for the fixed asset.
Depreciation lifecycle	String	Length of time in which the fixed asset is fully depreciated.
Depreciation term	String	Frequency of depreciation throughout the lifecycle of the fixed asset.
Remaining value	Currency	Amount that the fixed asset is worth today after depreciation.
Depreciated amount	Currency	Amount that the fixed asset has depreciated over time.
Salvage value	Currency	Amount that the fixed asset is worth after it reaches the end of its useful life.
ERP Source	Reference	ERP source system associated with the fixed asset.

Finance Exchange Rates [sn_fin_fx_rate] table

The Finance Exchange Rates [sn_fin_fx_rate] table stores currency exchange rates used for Finance Common.

This table contains the following fields.

Finance Exchange Rates table

Field	Data type	Description
ERP Source	Reference	ERP source system associated with the exchange rate.
Rate type	String	Type of the exchange rate.

Note: The Finance Exchange Rates table extends the base platform Currency Conversion Rate [fx_conversion_rate] table and inherits additional fields (such as From currency, To currency, Rate, and Effective date) from that table. Those inherited fields are defined at the platform level.

Ledger Account table

The Ledger Account [sn_fin_gl_account] table stores information related to: General ledger accounts.

Ledger Account [sn_fin_gl_account] table

The Ledger Account [sn_fin_gl_account] table contains the following fields.

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Ledger Account table

Field	Data type	Description
Account name	String	Display name of the ledger account fetched from the ERP system.
Number	String	System-generated number that uniquely identifies this ledger account.
Entity	Reference	Legal entity associated with the ledger account.
Ledger account	String	Ledger account code.
Short description	String	Short description of the ledger account.
Type	String	Type of the ledger account.
ERP source	Reference	ERP source system associated with the ledger account.
Ledger type	String	Type of ledger to which the account belongs.
Category	Choice	Category of the ledger account. The options are Cash, Revenue, Investment, or Cash and Cash Equivalent.
Inactive	Boolean	Inactive status of the ledger account.
Account currency	Reference	Currency of the ledger account.
Local currency	Reference	Local currency of the ledger account.
Reporting currency	Reference	Reporting currency of the ledger account.
Alternate currency	Reference	Alternate currency of the ledger account.
Open item management	Boolean	Indicates whether open item management is enabled for the account.
Sub-ledger account	String	Sub-ledger account code.
Key account	Boolean	Indicates whether this is a key account.
Zero balance account	Boolean	Indicates whether this is a zero balance account.
Risk rating	Choice	Risk rating of the ledger account. The options are High, Medium, or Low.
Description	String	Detailed description of the ledger account.

GL rule [sn_fin_gl_rule] table

The GL Rule [sn_fin_gl_rule] table stores general ledger classification rules.

GL rule [sn_fin_gl_rule] table

This table contains the following fields.

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GL rule table

Field	Data type	Description
Name	String	Name of the GL rule.
Class name	String	Table class name of the GL rule record.
Table	Table name	Table to which the GL rule applies.
Execution order	Integer	Order in which the GL rule is executed relative to other rules.
Inactive	Boolean	Inactive status of the GL rule.
Conditions	Conditions	Conditions on the selected table that determine when the rule applies.
Default	Boolean	Indicates whether this is the default GL rule.

Threshold rule [sn_fin_gl_threshold_rule] table

The Threshold Rule [sn_fin_gl_threshold_rule] table stores variance threshold information for general ledger rules.

This table extends the GL Rule [sn_fin_gl_rule] table and contains the following fields.

Threshold rule table

Field	Data type	Description
Threshold amount	Decimal	Threshold amount used to calculate variance.
Threshold percent	Decimal	Threshold percentage used to calculate variance.
Threshold type	Choice	Determines whether the threshold is calculated using amount, percent, or both. The options are Amount, Percent, Amount or Percent, or Amount and percent.
Name	String	Name of the GL rule. Inherited from the GL Rule [sn_fin_gl_rule] table.
Class name	String	Table class name of the rule record. Inherited from the GL Rule [sn_fin_gl_rule] table.
Table	Table name	Table to which the rule applies. Inherited from the GL Rule [sn_fin_gl_rule] table.
Execution order	Integer	Order in which the rule is executed relative to other rules. Inherited from the GL Rule [sn_fin_gl_rule] table.
Inactive	Boolean	Inactive status of the rule. Inherited from the GL Rule [sn_fin_gl_rule] table.
Conditions	Conditions	Conditions on the selected table that determine when the rule applies. Inherited from the GL Rule [sn_fin_gl_rule] table.
Default	Boolean	Indicates whether this is the default rule. Inherited from the GL Rule [sn_fin_gl_rule] table.

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Industry [sn_fin_industry] table

The Industry [sn_fin_industry] table stores industry classification information.

This table contains the following fields.

Industry table

Field	Data type	Description
Name	String	Name of the industry.
Parent	Reference	Parent industry to which this industry belongs.

Ledger [sn_fin_ledger] table

The Ledger [sn_fin_ledger] table stores financial reporting ledger data.

This table contains the following fields.

Ledger table

Field	Data type	Description
Ledger code	String	Code that identifies the ledger.
Short description	String	Short description of the ledger.
Inactive	Boolean	Inactive status of the ledger.
ERP source	Reference	ERP source system associated with the ledger.
Primary ledger	Boolean	Indicates whether this is the primary ledger.

Legal Entity [sn_fin_legal_entity] table

The Legal Entity [sn_fin_legal_entity] table stores information about legal entities used in financial and organizational structures.

This table extends the Organization [sn_fin_organization] table and contains the following fields.

Legal Entity table

Field	Data type	Description
Clearing account	String	Clearing account associated with the legal entity.
Trading partner	String	Trading partner associated with the legal entity.
Legal name	String	Legal name of the entity corresponding to the location in which it operates. Inherited from the Organization [sn_fin_organization] table.
Display name	String	System-generated display name of the entity. Inherited from the Organization [sn_fin_organization] table.
Global company	Reference	Main company to which this entity belongs at a global level. Inherited from the Organization [sn_fin_organization] table.
Region	Choice	Region from which the entity operates. The options are AMS, APAC, EMEA, or LATAM. Inherited from the Organization [sn_fin_organization] table.

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Legal Entity table (continued)

Field	Data type	Description
Industry	Reference	Industry to which the entity belongs. Inherited from the Organization [sn_fin_organization] table.
Local currency	Reference	Local currency of the entity. Inherited from the Organization [sn_fin_organization] table.
Active	Boolean	Indicates whether the entity is active or onboarded. Inherited from the Organization [sn_fin_organization] table.
Parent entity	Reference	Parent entity of this legal entity. Inherited from the Organization [sn_fin_organization] table.
Street address	String	Street address of the entity's location. Inherited from the Organization [sn_fin_organization] table.
City	String	City of the entity's location. Inherited from the Organization [sn_fin_organization] table.
State / Province	String	State or province of the entity's location. Inherited from the Organization [sn_fin_organization] table.
Zip / Postal code	String	Zip or postal code of the entity's location. Inherited from the Organization [sn_fin_organization] table.
PO box number	String	PO box number to which supplier correspondence and payments are sent. Inherited from the Organization [sn_fin_organization] table.
County / District	String	Specific area within a state or a province. Inherited from the Organization [sn_fin_organization] table.
Country	String	Country of the entity's location. Inherited from the Organization [sn_fin_organization] table.
Website	URL	Official website of the entity. Inherited from the Organization [sn_fin_organization] table.
Owner	Reference	User who owns this entity record. Inherited from the Organization [sn_fin_organization] table.
ERP company code	String	Company code of the entity in the ERP system. Inherited from the Organization [sn_fin_organization] table.
Status	Choice	Business relationship designated to the entity. Inherited from the Organization [sn_fin_organization] table.
Reporting currency	Reference	Reporting currency of the entity. Inherited from the Organization [sn_fin_organization] table.
Alternate currency	Reference	Alternate currency of the entity. Inherited from the Organization [sn_fin_organization] table.
ERP source	Reference	ERP source system associated with the entity. Inherited from the Organization [sn_fin_organization] table.
Image	Image	Image of the entity's logo. Inherited from the Organization [sn_fin_organization] table.

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Office Location table

The Office Location [sn_fin_office_location] table stores data about organization office locations, including address, country, legal entity, and ERP source.

This table contains the following fields.

Office Location table

Field	Data type	Description
Name	String	Display name used when referencing this office location.
Location	Reference	Address of this office location.
Country	Reference	Country in which this office location exists.
Legal entity	Reference	Legal entity responsible for this office location.
Default	Boolean	Determines whether this is the organization's default location.
ERP Source	Reference	ERP source system associated with the office location.

Organization [sn_fin_organization] table

The Organization [sn_fin_organization] table stores information about organizational entities such as companies and legal entities.

This table contains the following fields.

Organization table

Field	Data type	Description
Type	Choice	Table class name that indicates the specific type of organization record.
Display name	String	System-generated display name of the organization.
Legal name	String	Legal name of the entity corresponding to the location in which it operates.
Short description	String	Short description of the organization.
Global company	Reference	Main company to which this entity belongs at a global level.
Region	Choice	Region from which the entity operates. The options are AMS, APAC, EMEA, or LATAM.
Industry	Reference	Industry to which the entity belongs.
Local currency	Reference	Local currency of the entity.
Active	Boolean	Indicates whether the entity is active.
Parent entity	Reference	Parent entity of this organization.
Street address	String	Street address of the entity's location.
City	String	City of the entity's location.
State / Province	String	State or province of the entity's location.
Zip / Postal code	String	Zip or postal code of the entity's location.

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Organization table (continued)

Field	Data type	Description
PO box number	String	PO box number to which supplier correspondence and payments are sent.
County / District	String	Specific area within a state or a province.
Country	String	Country of the entity's location.
Website	URL	Official website of the entity.
Owner	Reference	User who owns this organization record.
ERP company code	String	Company code of the entity in the ERP system.
Status	Choice	Business relationship designated to the entity.
Reporting currency	Reference	Reporting currency of the entity.
Alternate currency	Reference	Alternate currency of the entity.
ERP source	Reference	ERP source system associated with the entity.
Image	Image	Image of the entity's logo.
Is transform map running?	Boolean	Internal flag that indicates whether a transformation is in progress.

Approval Group [sn_shop_approval_group] table

The Approval Group [sn_shop_approval_group] table stores information related to: Approval groups.

This table contains the following fields.

Approval Group table

Field	Data type	Description
Name	String	Approval group associated with the approval rule.
Approving object	Table name	Type of item that needs approval.

Approval Rule [sn_shop_approval_rule] table

The Approval Rule [sn_shop_approval_rule] table stores the rules that determine how and when approval requests are sent for purchasing objects.

This table contains the following fields.

Approval Rule table

Field	Data type	Description
Number	String	System-generated number used to identify this approval rule.
Name	String	Name of this approval rule.
Active	Boolean	When selected, this rule requests approvals.

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Approval Rule table (continued)

Field	Data type	Description
Approval rule type	Choice	Determines how approvals are requested. The options are Cost Center Managers, Dynamic Users or Groups, Managerial Job Code Hierarchy, Managerial Hierarchy, or Specified Users or Groups.
Base approvals on	Field name	Person on whom the approval rule is based.
Purchasing user (deprecated)	Field name	User from whom approvals are triggered. This field is deprecated.
Send approval request to	Choice	People who receive an approval request. The options are Direct Manager, Most Senior Manager, All Managers in Hierarchy, All Users up to the User with Authorized Code, or Most Junior User with an Authorized Code.
Up to job level	Reference	Highest job level to which an approval request is sent.
Authorized job codes	List	Job codes of those who can approve this object.
Approval limit	Currency	Maximum amount that can be approved by the authorized job codes.
Approval sequence	Choice	Determines whether approval requests are sent all at once or one at a time. The options are Send Approvals in Parallel or Send Approvals Sequentially.
Approval required from	Choice	Determines whether all approvers or just one approver must approve. The options are All Approvers Must Approve or Any Approver Can Approve.
Users	List	People who can approve this object.
Groups	List	Groups that can approve this object.
Send approval to purchasing user's (deprecated)	Field name	Approval is sent dynamically to a user or group related to the purchasing user. This field is deprecated.
Approval trigger conditions	Conditions	Conditions that the object details must meet for an approval request to be sent.
Approving object	Table name	Type of item that needs approval.
Approving line	Table name	Line items of the approving object that define the triggers for an approval request.
Allow automatic approval	Boolean	When selected, the requester receives automatic approval if the role has the required authority.

Approval Rule Composition table

The Approval Rule Composition [sn_shop_approval_rule_composition] table stores rule ordering within approval groups.

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This table contains the following fields.

Approval Rule Composition table

Field	Data type	Description
Approval group	Reference	Approval group associated with this approval rule composition.
Approval rule	Reference	Approval rule associated with this approval rule composition.
Order	Integer	Execution order of the approval rule within this approval rule composition.

Attribute [sn_shop_attribute] table

The Attribute [sn_shop_attribute] table stores product attribute values.

This table contains the following fields.

Attribute table

Field	Data type	Description
Type	Reference	Attribute type of this attribute.
Value	String	Value of the specified attribute.
Product model	Reference	Product model to which this attribute is associated.
Image	Image	Image associated with the attribute.
Active	Boolean	Indicates whether the attribute is active.

Attribute Set [sn_shop_attribute_set] table

The Attribute Set [sn_shop_attribute_set] table groups attribute types.

This table contains the following fields.

Attribute Set table

Field	Data type	Description
Name	String	Name of the attribute set.
Attribute types	List	Reference to all attribute types that belong to this set.

Attribute Type [sn_shop_attribute_type] table

The Attribute Type [sn_shop_attribute_type] table stores product attribute definitions.

This table contains the following field.

Attribute Type table

Field	Data type	Description
Code	String	Unique identifier, or key, for the attribute.

Delivery Location [sn_shop_delivery_location] table

The Delivery Location [sn_shop_delivery_location] table stores delivery address information.

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This table contains the following fields.

Delivery Location table

Field	Data type	Description
Address	String	Calculated value that combines the recipient's name and location.
Street	String	Street address of the delivery location.
City	String	City of the delivery location.
State / Province	String	State of the delivery location.
Zip / Postal Code	String	Zip code of the delivery location.
Country	Reference	Country of the delivery location.
Country Name	String	Country name of the delivery location.
Shopper	Reference	Logged-in user who saved this address.
Recipient	Reference	User who is the recipient of this address.
User saved location	Boolean	Indicates that the user saved the address for future purchases.
User default location	Boolean	Indicates whether this is the user's default location.
Deleted	Boolean	Indicates that the user soft-deleted this saved address. The record is retained for auditability and possible restore rather than being removed.
Work address	Reference	Office location associated with this address.
Location	Reference	Location used for integration with third-party systems.
Address verification	Choice	Indicates whether this delivery address is a real, shippable location. The options are Pending review, Valid address, or Invalid address.
Address approval	Choice	Indicates whether this delivery address can be used for user purchases. The options are Company approved, Not approved, Pending Review, or One time approval.

Job Code [sn_shop_job_code] table

The Job Code [sn_shop_job_code] table stores job codes for users.

This table contains the following fields.

Job Code table

Field	Data type	Description
Code	String	Job code for a user.

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Payment Terms [sn_shop_payment_term] table

The Payment Terms [sn_shop_payment_term] table stores payment term information.

This table contains the following fields.

Payment Terms table

Field	Data type	Description
Payment term	String	Name or code of the payment term.
Short description	String	Short explanation of the payment term.
Type	Choice	Type of payment term. The options are Due upon receipt, Fixed, or Net.
Discount percentage	Decimal	Percentage of discount applied on the total invoice amount.
Active	Boolean	Indicates whether the payment term is active.
Payment due by	Choice	When the payment is due. The options are End of the year or End of the month.
Discount days	Integer	Number of days from the invoice generation date until the discount applies.
Net days to pay	Integer	Total number of days within which the payment must be made.

Price Break [sn_shop_price_break] table

The Price Break [sn_shop_price_break] table stores quantity-based pricing information.

This table contains the following fields.

Price Break table

Field	Data type	Description
From quantity	Decimal	Lower limit quantity for a price break.
To quantity	Decimal	Upper limit quantity for a price break.
Price	Currency	Price amount for the price break.
Supplier product contract	Reference	Supplier product and contract relationship associated with the price break.
ERP source	Reference	ERP source system associated with the price break.
ERP number	String	Unique identifier generated within an ERP system for this price break.

Pricing [sn_shop_m2m_product_contract] table

The Pricing [sn_shop_m2m_product_contract] table stores contract-specific product pricing information.

This table contains the following fields.

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Pricing table

Field	Data type	Description
Contract	Reference	Contract associated with the supplier product.
Price	Currency	Single contractual price associated with the supplier product.
Maximum price	Currency	Maximum price from price breaks for the supplier product.
Minimum price	Currency	Minimum price from price breaks for the supplier product.
Original unit cost	Currency	Original unit cost of the supplier product.
Price type	Choice	Type of contractual pricing for the supplier product. The options are Single Price or Price Break.
Display name	String	Display name for this relation.
Price duration	Choice	Whether the contractual price is for a one-time purchase or a term purchase. The options are One Time or Term.
ERP source	Reference	ERP source system associated with the supplier product contract.

Product group [sn_shop_product_group] table

The Product group [sn_shop_product_group] table stores product model grouping information.

This table contains the following fields.

Product group table

Field	Data type	Description
Name	String	Name of the product model group.
Attribute set	Reference	Attribute set that defines which product attributes are created for related product models.

Product Visuals [sn_shop_supplier_product_artifact] table

The Product Visuals [sn_shop_supplier_product_artifact] table stores product images and media.

This table contains the following fields.

Product Visuals table

Field	Data type	Description
Name	String	Name of the product visual artifact.
Product model	Reference	Product model associated with this artifact.
Image	Image	Image file for the product artifact.
Type	Choice	Type of artifact. The options are Image, Video, or PDF.

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Product Visuals table (continued)

Field	Data type	Description
Thumbnail url	URL	URL of the thumbnail image for the artifact.
Youtube url	URL	YouTube URL of the artifact video.
Image url	URL	URL of the artifact image.
Active	Boolean	Indicates whether the artifact is active.
Primary	Boolean	Indicates whether the artifact is the primary artifact for the product.
Video	Video	Video file associated with the artifact.
Document	Attachment	File attachment for the artifact, such as a PDF.
Video source	Choice	Source of the video. The options are Upload or YouTube video.

Shipping methods [sn_shop_shipping_method] table

The Shipping methods [sn_shop_shipping_method] table stores shipping method and carrier information.

This table contains the following fields.

Shipping methods table

Field	Data type	Description
Name	String	Name of the shipping method.
Carrier	String	Shipment carrier used for delivery of the purchase.
Supplier	List	Suppliers associated with tracking information for the shipment.
Shipper delivers to	List	Countries in which shipping is available.
Active	Boolean	Indicates whether the shipping method is active.

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

Sourcing and Procurement Operations glossary

Learn about the terms and concepts used in Sourcing and Procurement Operations (SPO).

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Glossary terms are grouped alphabetically.

A | B | C | D | E | F | G | H | L | M | N | O | P | Q | R | S | T | V | W

A

activity stream

A chronological log of all events, changes, and communications within a procurement case or task. Displays field changes, comments, attachments, and email correspondence based on configured display settings.

approval

The process where an authorized reviewer (approver) reviews and either accepts or rejects a purchase requisition before it can proceed to fulfillment. Approvals are based on defined thresholds and authority levels.

approval duration

The time period (measured in hours) allocated for an approver to complete an approval request. Used to calculate approval due dates and track SLA compliance.

approval reassessment

The system feature that can resend approval requests when purchase requisition details change significantly. Can be configured to maintain control when requisition amounts or requirements are modified.

as soon as possible

A delivery date option for standard orders requiring immediate fulfillment without specifying an exact date.

auto-order threshold

A system setting that determines the maximum purchase requisition amount that can be automatically ordered without additional review. Requisitions at or below this threshold bypass final review.

award

The action of selecting a winning supplier after negotiation and quote evaluation. Awarding finalizes the supplier selection and initiates the purchase order creation workflow.

awaiting response

A sourcing status indicating the procurement team is waiting for supplier feedback, clarification, or documentation before proceeding with negotiation or decision phases.

B

blanket purchase order

A type of purchase order that spans a timeframe (days, weeks, months, quarters, or years) without specifying individual delivery dates or quantities upfront. Individual purchases are released against the blanket order as needs arise. Credits cannot be used with blanket orders.

bundle

A pre-configured group of multiple products and services sold as a single purchasable item with unified pricing. Bundles can contain individual products, services, or nested child bundles, and are treated as a single cart line item.

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bundle pricing

The aggregated cost calculation for bundles that combines prices of all component items, applies a direct shipping amount (not percentage-based), and calculates tax on the aggregate total.

Business Rules

Automated system triggers that change status values or perform actions based on specific conditions being met (such as qualification completion or quote submission).

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.

cancel

The action to reject and terminate a procurement activity such as a purchase order, requisition, or procurement case. Cancellations create an audit trail recording the reason and user information.

Case Management

The system's framework for handling purchase modification and cancellation requests from shoppers. Cases track the lifecycle from creation through fulfillment and closure.

case resolution

The fulfiller's proposed solution or response to a procurement case request. Can be accepted by the requestor (moving case to resolved state) or rejected (returning case to open for further discussion).

category management

The procurement process of organizing and standardizing product and service categories for catalog management, spend analysis, and sourcing strategies.

checkout

The final step in the purchasing process where shoppers review their cart, specify delivery details, select payment method, and submit their purchase requisition.

child bundle

A nested bundle contained within a parent bundle. Child bundles can themselves contain products, services, or grand-child components.

Close Notes

Documentation field where fulfillers record their resolution details or comments explaining the confirmation decision for a procurement case.

contract

A formal agreement between the organization and a supplier defining terms, pricing, delivery conditions, and service levels for goods or services.

contract model

A template defining the structure and terms for new contracts. The system can be configured with a default contract model used when creating contracts without specific product category specifications.

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cost center

A department, project, or organizational unit to which procurement costs are allocated for budget tracking and financial reporting purposes.

credit

Pre-allocated purchasing power or promotional funds available to shoppers for specific purchases. Credits can only be used with standard orders, not blanket purchase orders.

D

Delegate Shopper

A user role with permission to shop on behalf of other employees while maintaining their own shopping privileges.

delivery address

The physical location where ordered products should be shipped or services should be performed.

delivery address validation

The system check ensuring the delivery location is valid and meets business requirements (such as company facility addresses) before order submission.

delivery date

The requested or specified date when products should be delivered or services should be completed. For blanket orders, this is a timeframe rather than a specific date.

delivery location

The geographic or organizational destination for fulfillment of a purchase order or sourcing request.

E

email correspondence

Records of email communications related to a procurement case or request, visible in the activity stream based on configuration.

Employee Center

The ServiceNow employee-focused portal providing self-service access to procurement, HR, IT, and other workplace services.

ERP (Enterprise Resource Planning)

The backend financial system containing master data (legal entities, accounts, cost centers) that integrates with SPO for financial tracking and reporting.

estimated subtotal

The calculated price for a child bundle within a parent bundle, noting it is part of the parent's total and may vary based on delivery location.

estimated total

The calculated aggregate price for a bundle or purchase requisition, with a notation that the total might vary based on delivery location due to taxes and shipping variations.

F

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final review

The approval process stage where designated approvers review requisitions before they can be ordered, based on configured amount thresholds.

fulfiller

A user assigned to handle and resolve a procurement case or task, responsible for reviewing requests and determining appropriate actions.

fulfillment

The process of delivering ordered products or providing ordered services to the requesting party, including receipt and acceptance.

G

gross amount

The total procurement cost before taxes and shipping deductions.

H

handling fee

An optional charge that can be added to individual purchase lines to cover administrative, packaging, or specialty processing costs.

hierarchical structure

The organizational arrangement of bundled items showing parent bundles containing child bundles which contain individual products and services.

L

line item

An individual product or service within a purchase requisition, purchase order, or invoice, each with its own quantity, price, and specifications.

M

multi-cost-center allocation

Payment method distribution across multiple cost centers, with portions of the total purchase allocated to different departmental or project budgets.

N

negotiation

Individual discussions with a supplier to track activities like pricing, product requests, or agreement terms.

sourcing 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.

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ServiceNow Otto for SPO

An application that uses generative AI to summarize procurement-related records and facilitate conversational procurement tasks.

NDA (Non-Disclosure Agreement)

A legal contract protecting confidential information shared during procurement activities.

O

order type

Classification of a purchase order as either "standard" (with specific delivery dates) or "blanket" (with timeframe-based delivery).

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.

procurement task

A specific action or step that contributes to the completion of a procurement case.

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.

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.

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parent bundle

A bundle that contains other bundles (child bundles) or individual products and services as components.

punchout

An e-commerce integration mechanism allowing shoppers to access supplier catalogs directly within the procurement system and return with selected items.

purchase modification

A change request to an existing purchase order or requisition, handled through the case management system.

Q

qualification

The evaluation process determining which suppliers meet organizational requirements and are eligible for participation in sourcing activities.

Qualification Needed

A sourcing status indicating supplier qualification is required before negotiation can proceed.

Qualified

A sourcing status indicating suppliers have successfully completed qualification and are eligible for negotiation.

quote

A supplier's proposal including pricing, terms, delivery timeline, and other commercial details submitted during negotiations.

R

record summarization

A feature of ServiceNow Otto 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.

receipt

Confirmation of physical delivery or service completion, including verification that ordered items match the purchase order specifications.

receipt integration

The process where the procurement system integrates with the receiving/logistics system to update purchase order statuses upon goods arrival and acceptance.

requestor

The employee who submitted a purchase request or who submitted a procurement case requesting modifications or cancellations.

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Requires Decision

A sourcing status indicating quote evaluation is complete and awaiting supplier selection by the procurement specialist.

revision request

A request to modify an existing purchase requisition or order, which can be approved or rejected by procurement specialists.

RFP (Request for Proposal)

A formal procurement request seeking comprehensive proposals including pricing, capability demonstrations, and implementation details from potential suppliers.

RFQ (Request for Quote)

A procurement request sent to suppliers asking them to provide pricing and terms for specified goods or services.

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

A workflow 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 that the shopper intends to buy needs to be sourced due to the lack of an active contractual price.

service receipt

Confirmation that a service has been completed and accepted, including verification against the service description in the purchase order.

shopper

An employee with authorization to request purchases through the Shopping Hub.

shopping cart

The temporary holding area where selected products and services are accumulated before checkout and submission.

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sourcing

The process of identifying, evaluating, and selecting suppliers to fulfill organizational procurement needs.

spend management

The practice of analyzing, optimizing, and controlling procurement spending to achieve cost savings and compliance objectives.

standard order

A purchase order with a specific delivery date or ASAP delivery, supporting credit usage and immediate fulfillment requirements.

supplier

A vendor or service provider that supplies goods or services to the organization through procurement contracts and purchase orders.

supplier product

A specific product or service offering from a supplier that is available for purchase through the shopping catalog.

T

tax estimate

The calculated sales tax or value-added tax (VAT) applied to purchase orders based on delivery location and product type.

V

Virtual Agent

An AI-powered conversational chatbot that helps shoppers quickly find and purchase products from vendors via the Shopping Hub application, accessible through Employee Center.

validation

The system checks ensuring data meets required criteria before allowing progression to the next workflow stage.

validation rules

Business logic constraints (such as blanket order credit restrictions or bundle type delivery requirements) applied during checkout and order processing.

VAT (Value-Added Tax)

A consumption tax applied to goods and services in many regions, calculated during checkout based on delivery location.

W

Work Items

Automatically created tasks or cases displayed in process tracking views, representing actions requiring shopper or fulfiller attention.

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Work Notes

Internal notes visible only to fulfillers for internal collaboration on procurement cases without notifying customers.

workflow

The defined sequence of statuses, conditions, and actions that a procurement request progresses through from creation to completion.

Address deletion permissions

Delivery addresses can be deleted only by the user who saved them or by a delegated shopper acting on behalf of that user.

Who can delete a delivery address

Address deletion permissions

User	Can delete a saved address	Role required
The user who saved the address	Yes	*sn_shop.shopper*
A user shopping on behalf of the address owner (Shop As)	Yes	*sn_shop.shopper*
Any other user, including administrators	No	Not applicable

⚠ **Warning:** Administrators who did not save an address cannot delete it from the saved addresses list.

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.

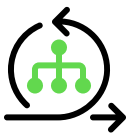
This video provides a visual overview of Supplier Lifecycle Operations and its key capabilities.

https://player.vimeo.com/video/1174012771?h=6111328327&badge=0&autopause=0&player_id=0&app_id=58479

Supplier Lifecycle Operations value proposition



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ServiceNow Otto for Supplier Lifecycle Operations (SLO)  Learn about ServiceNow Otto for SLO	Explore  Learn about how supplier managers and supplier contacts use Supplier Lifecycle Operations.	Configure  Plan and configure your implementation.
Integrate  Extend the capabilities of Supplier Lifecycle Operations by integrating with other applications.	Use  Resolve supplier inquiries with self-service, compare suppliers, onboard suppliers, and manage supplier data.	Reference  Get details about components, such as fields, tables, and properties.

Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the https://www.servicenow.com/docs/access?context=supplier-lifecycle-operations-rn-static&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SLO Implementation Essentials and more, from ServiceNow University.

ServiceNow Community

Connect with other Supplier Lifecycle Operations users at ServiceNow Community.

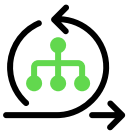
ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Use the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application to guide your supplier managers through a conversation-like experience for their supplier needs.

ServiceNow Otto is the new AI experience brand. This change is reflected in the name of ServiceNow products, including ServiceNow Otto for SLO.

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Get started

Explore	Configure	Use
		
Learn more about ServiceNow Otto for SLO	Configure the ServiceNow Otto for SLO application to get started	Use generative AI capabilities that are offered by ServiceNow Otto for SLO

Important: 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. Please check for availability updates in future releases.

Supported LLMs for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

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. Furthermore, 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. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

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For more information, see the Now Assist documentation.

Explore ServiceNow Otto for Supplier Lifecycle Operations (SLO)

With the ServiceNow Otto 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.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Overview of ServiceNow Otto for SLO

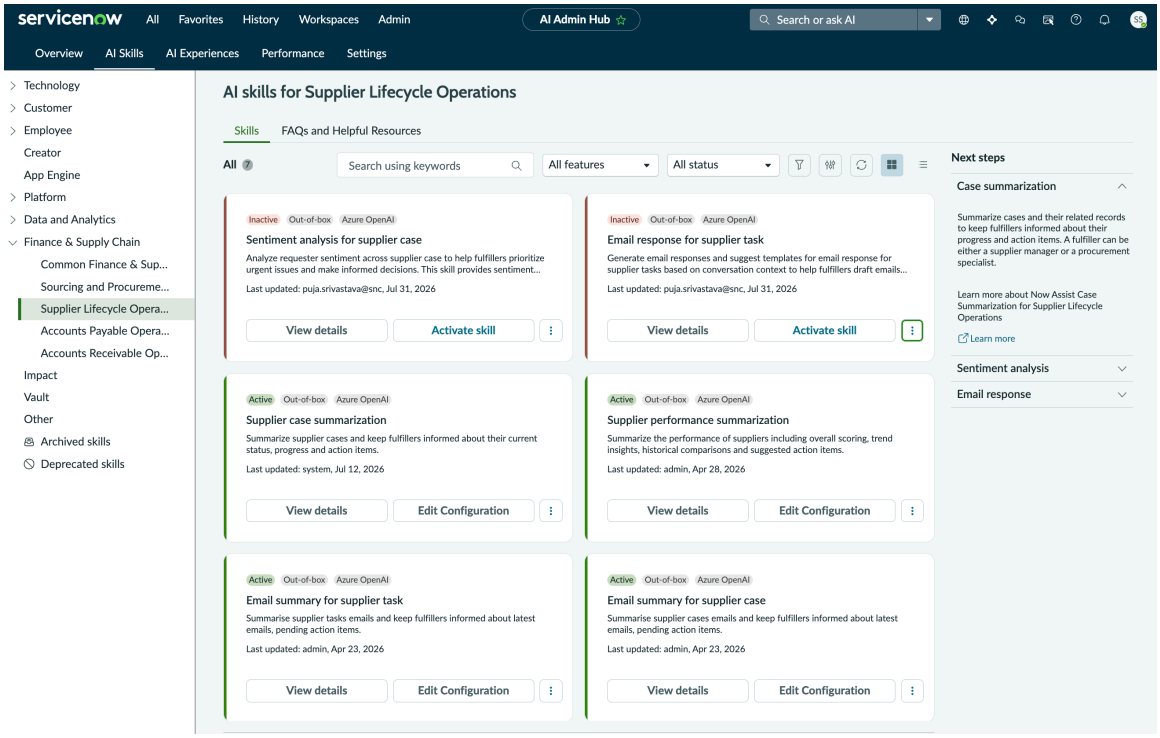
With ServiceNow Otto for Supplier Lifecycle Operations (SLO) skills, supplier managers can generate summary of supplier cases and supplier's KPI performance. The Supplier case summarization skill provides supplier managers a concise overview of the case, actions completed so far, and the next steps that need to be taken. The Supplier performance summarization skill helps the supplier managers know the overall supplier performance score, trend, performance details, historical context, and next steps.

ServiceNow Otto for Supplier Lifecycle Operations (SLO) includes the following capabilities:

- Supplier case summarization provides supplier managers a summary of the supplier-related cases. This enables them to quickly assess the status of any case in the supply process and take the necessary actions.
- Supplier performance summarization provides supplier managers a complete KPI performance summary, including overall performance scores, and trends.
- Sentiment Analysis helps reduce escalated cases by providing agents with the current sentiment on a case, based on interactions and the latest trends. It also offers insights into why the sentiment is what it is today.
- Email response generation generates contextually relevant email responses by analyzing case and task details.

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AI skills for SLO



Note:

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Skills

The ServiceNow Otto 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.

Supplier case summarization

Provides supplier managers a summary of the supplier-related cases. Supplier managers can see the status of any case in the supply process and take the necessary actions quickly. Supplier managers can also refresh and post the summary to the work notes or activity stream.

Fulfillers can customize prompt configuration and prompt optimization using the preprocessor in the AI Skill kit. The skill supports multiple models such as OpenAI, Claude, Gemini, Now LLM. To customize the prompt instructions, sn_skill_builder_admin role is mandatory.

For more information about how to summarize a case, see Summarize a case by using ServiceNow Otto for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace.

Supplier performance summarization

Provides supplier managers the complete KPI performance summary including overall performance scores, trends, and action items.

For more information about how to summarize a supplier's performance, see Summarize supplier performance in Source-to-Pay Workspace.

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Sentiment Analysis for supplier case

The Sentiment Analysis skill analyzes requester's responses and determines the overall sentiment associated with a supplier case. The sentiment and sentiment trend help you gauge the urgency of a case. They indicate whether the requester's tone is improving, worsening, or remaining consistent over time. For more information, see Analyze sentiments in supplier cases.

Email response for supplier case

The Email response for supplier case skill generates contextually relevant email responses. It analyzes case details such as case type, short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles. Use this skill to draft, adjust the tone, shorten, or elaborate email responses, reducing the time spent on manual email composition. You can also use predefined templates to maintain consistency in your email responses. For more information, see Generate an email response for supplier cases.

Email response for supplier task

The Email response for supplier task skill generates contextually relevant email responses. It analyzes task details such as case type, short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles. Use this skill to draft, adjust the tone, shorten, or elaborate email responses, reducing the time spent on manual email composition. You can also use predefined templates to maintain consistency in your email responses. For more information, see Generate an email response for supplier tasks.

To learn how to configure ServiceNow Otto for SLO, see Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO).

To learn more about how to use ServiceNow Otto for SLO, see Use ServiceNow Otto for Supplier Lifecycle Operations (SLO).

Related topics

Supporting information for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Supporting information for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Get a quick overview of the important information that is related to the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application.

Supported user interfaces

The ServiceNow Otto for SLO application includes the skills that are listed in the following table.

ServiceNow Otto for SLO supported interfaces

Interface	Skill
Virtual Agent	• Conversational interface in ServiceNow Otto in Virtual Agent. • Track request status

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ServiceNow Otto for SLO supported interfaces (continued)

Interface	Skill
Source-to-Pay Workspace	Supplier case summarization
Core UI	Supplier case summarization

Application information

Activate the ServiceNow Otto for SLO store app (com.snc.sn_supplier_gen_ai) to use the Case summarization skill.

This store app has the following dependencies:

- ServiceNow Otto for Platform (com.sn.now.platform)
- Supplier Case Management (com.snc.sn_supplier_mgmt)

Activate the applications in the following order:

1. ServiceNow Otto for Platform (sn_genai_platform)
2. Supplier Case Management (com.snc.sn_supplier_mgmt)
3. ServiceNow Otto for Supplier Lifecycle Operations (SLO) (com.snc.sn_supplier_gen_ai)

For more information, see Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO).

Related topics

Explore ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application to enable supplier managers to use generative AI skills in Source-to-Pay Workspace and Core UI.

Before you begin

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Role required: admin

About this task

Use the AI Admin Hub to configure ServiceNow Otto for SLO. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub.

The following table lists the feature and skill that you can access from the AI Admin Hub.

ServiceNow Otto for SLO feature and skill in the AI Admin Hub

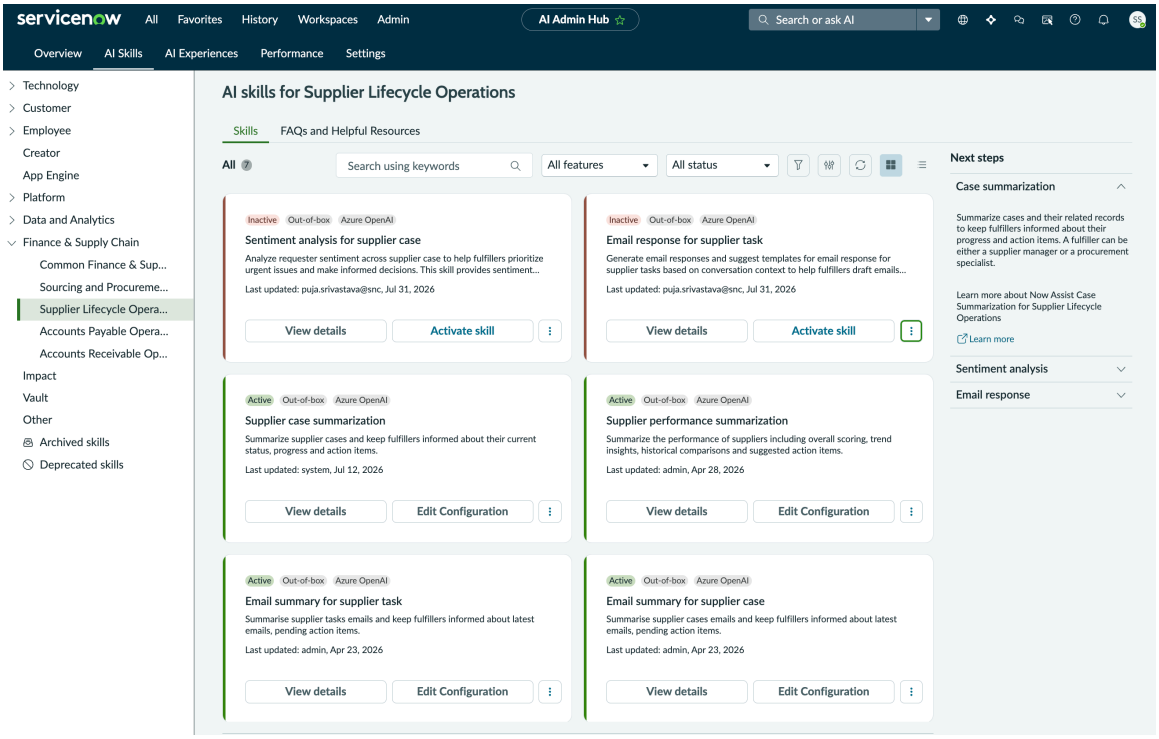
ServiceNow Otto for SLO feature	Skill
Case summarization	Supplier case summarization

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ServiceNow Otto for SLO feature and skill in the AI Admin Hub (continued)

ServiceNow Otto for SLO feature	Skill
KPI performance summarization	Supplier performance summarization

AI skills for SLO



Procedure

1. Install the ServiceNow Otto 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 ServiceNow Otto for Supplier Lifecycle Operations (SLO).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab of the AI Admin Hub.
3. Expand the **Finance and Supply Chain** workflow group and select **Supplier Lifecycle Operations**.

   The Supplier Lifecycle Operations features are grouped under the Finance and Supply Chain workflow group. Each feature has its associated skill.

4. Activate and configure the AI skills for Supplier Lifecycle Operations.
   For example

Supplier case summarization skill

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**.

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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 activate a skill by using the Guided Setup.
7. Select **Choose input** for the skill 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. 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. Select **Define Availability** and select one of the following options.

Option	Description
Skill is always available	The skill is available to users at all times.
Customize skill availability	The skill is available only when certain condi tions are met (Default). Use the condition builder to set your condi tions.

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.

Option	Description
In-product desktop	AI skills are displayed on forms and work spaces.
ServiceNow Otto panel	AI skills are available in the ServiceNow Ot to panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more infor mation, see Configure multilingual service for **Note:** If you don't see this option, you must activate the ServiceNow Otto pan el. For more information, see Activate the ServiceNow Otto panel standard

13. Select **Save and continue** to go to the next step.
14. Review your choices and complete the configuration of the skill by selecting **Activate**.
15. Select **Return to Supplier Lifecycle Operations**.
The skill is activated.

Related topics

Customize a ServiceNow Otto for Supplier Lifecycle Operations (SLO) skill for Case summarization

Customize ServiceNow Otto for Supplier Lifecycle Operations (SLO) to use the Virtual Agent chat

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Configure skill input for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Customize a ServiceNow Otto for Supplier Lifecycle Operations (SLO) skill for Case summarization

If you have the admin role, you can customize a ServiceNow Otto 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 AI Admin Hub, 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** > **AI Admin Hub** and select the **AI Skills** tab.
2. In the **Finance and Supply Chain** workflow group, select **Supplier Lifecycle Operations** to view the AI skills for the ServiceNow Otto for SLO features.
3. Create a copy of an active skill and customize the input fields.

   a. From the listed active skills, locate the skill that you'd like to copy and select the More actions icon (⋮).

   b. Select **Make copy**.

      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 Configure skill input for ServiceNow Otto 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.

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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.

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 output.

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.

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. Define who can use the skill using Access control lists (ACLs).
   Roles selected here will be available in the 'Select display' step.
9. Configure where to display the supplier case summarization.

   a. Select the **In-product desktop Display** toggle to display the AI skill 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 the **ServiceNow Otto panel Display** toggle to activate the AI skill in the ServiceNow Otto panel.

   c. Select **Save and continue** to go to the next step.

10. 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.

Related topics

Customize ServiceNow Otto for Supplier Lifecycle Operations (SLO) to use the Virtual Agent chat

Configure skill input for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Customize ServiceNow Otto for Supplier Lifecycle Operations (SLO) to use the Virtual Agent chat

If you have the admin role, you can configure the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application so that suppliers can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

Before you begin
Role required: admin

About this task
Use the AI Admin Hub to configure ServiceNow Otto for SLO. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub.

Procedure

1. Install the ServiceNow Otto 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 ServiceNow Otto for Supplier Lifecycle Operations (SLO).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
3. From the list of existing LLM Virtual Agents, select **Now Assist in Virtual Agent - Supplier**.
4. Review the details about Virtual Agent by selecting **Overview** and then selecting **Save and continue** to go to the next step in Guided Setup.
5. Review the selected conversational skills by selecting **Now Assist skills** and then selecting **Save and continue** to go to the next step in Guided Setup.

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6. Review the selected portal by selecting **Display experience** and then selecting **Save and continue** to go to the next step in Guided Setup.
7. Review the search sources by selecting **Information Sources** and then selecting **Save and continue** to go to the next step in Guided Setup.
8. Review the branding information by selecting **Branding** and then selecting **Save and continue** to go to the next step in Guided Setup.
9. Review the structure of the chat experience by selecting **Chat experience** and then selecting **Save and continue** to go to the next step in Guided Setup.
10. Review all the details by selecting **Review** and then selecting **Turn on**.

Related topics

Customize a ServiceNow Otto for Supplier Lifecycle Operations (SLO) skill for Case summarization

Configure skill input for ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Configure skill input for ServiceNow Otto 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.

AI skills for ServiceNow Otto for SLO

The ServiceNow Otto for SLO includes the following skills:

- Supplier case summarization
- Supplier performance summarization

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.

The following table lists the inputs for the Supplier case summarization skill from the Choose input for supplier request page in the AI Admin Hub.

Supplier case summarization skill

Input	Description
Base input table	Supplier case [sn_slm_case] table
Base input fields	• Short description • Description • State • Work notes

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Supplier case summarization skill (continued)

Input	Description
	• Additional comments • Assigned to • Created • Created by • Due date • Case type • Supplier • Priority • Close notes

Supplier performance summarization skill

Inputs for the Supplier performance summarization skill identify the table and fields that are used when the summary is generated for a supplier's KPIs.

The following table lists the inputs for the Supplier performance summarization skill from the Choose input for supplier request page in the AI Admin Hub.

Supplier performance summarization skill

Input	Description
Base input table	KPI [sn_kpi_kpi] table
Base input fields	• Name • Active • Type • Domain • Last period data • Performance • Threshold set • Current threshold

Related topics

Customize a ServiceNow Otto for Supplier Lifecycle Operations (SLO) skill for Case summarization

Customize ServiceNow Otto for Supplier Lifecycle Operations (SLO) to use the Virtual Agent chat

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Generate supplier-related case summaries to get a quick overview of cases, completed actions, or pending tasks. Role required: sn_slm.fulfiller or sn_slm.admin.

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Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

For more information on how to use ServiceNow Otto for SLO to summarize a case, see Summarize a case by using ServiceNow Otto for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace.

For more information on how to use ServiceNow Otto for SLO in a Virtual Agent chat, see Use ServiceNow Otto for Supplier Lifecycle Operations (SLO) in a Virtual Agent chat.

Related topics

- Summarize a case by using ServiceNow Otto for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace
- Use ServiceNow Otto for Supplier Lifecycle Operations (SLO) in a Virtual Agent chat
- Explore ServiceNow Otto for Supplier Lifecycle Operations (SLO)
- Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO)

AI driven supplier onboarding using ServiceNow Otto for SLO

Use the AI driven supplier onboarding playbook to automate onboarding tasks such as supplier registration, information validation, and task list generation.

Accessing the AI driven supplier onboarding playbook

To access the AI driven supplier onboarding playbook:

1. In the decision builder, open the Supplier case playbook.
   a. Change the existing playbook case type from **Onboard new supplier** to **AI driven supplier onboarding**.
   b. Select **Save**.
2. Set the default model for the One Extend capabilities.
   a. Navigate to **Sys_One_Extend_Capability**.
   b. Open the Generic Prompt record.
      i. Go to the OneExtend Definition Configs related list.
      ii. In the default column, ensure that at least one model is marked to **True**.
   c. Open the Summarize record.
      i. Go to the OneExtend Definition Configs related list.
      ii. In the default column, ensure that at least one model is marked to **True**.

Available AI agents in AI driven supplier onboarding

The following table lists the agents that are used in the workflow.

Important: In the Define availability screen for the AI agent, make sure that the **Status** toggle is enabled to activate the AI agent.

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AI agents used in AI driven supplier onboarding

AI agent	AI agent role
Supplier data steward AI agent	• Ensures that the supplier data is accurate, compliant, and continuously maintained across systems. During onboarding, this agent also checks for duplicate supplier records. **Note:** Duplicate supplier onboarding requests can be resolved from the ServiceNow Otto panel by updating the legal name or the email domain of the primary contact's email address. • Handles supplier onboarding by creating an invitation case for the supplier contact and assigning the necessary supplier tasks. Additionally, it ensures that the supplier case status is updated appropriately in the system. • Leverages Web search results to generate a supplier scorecard highlighting key strengths, positive indicators, and potential risk signals. • If Craft is configured, the workflow leverages the Craft integration to generate a comprehensive, normalized supplier scorecard and risk assessment. It provides a structured evaluation of the supplier's overall profile and associated risk factors.
Supplier data validator AI agent	Takes a supplier case number and initiates the supplier banking task validation process, which compares the bank account proof against the banking details provided by the supplier contact.
Supplier approval AI agent	On approval, confirms supplier activation, activates supplier record and updates supplier company information, sends welcome email to the supplier, notifies the requester on onboarding status, and updates the case status to Closed complete. On rejection, provides a reason for rejection, sends an email to the supplier, notifies the requester and supplier about onboarding status, and updates the case to Closed rejected.
Supplier document strategy generator agent	• Generates customized onboarding tasks that meet the supplier's compliance and regulatory documentation requirements. Tasks are customized based on the following two factors: ○ The region in which the supplier is based. ○ The industry in which the supplier operates.

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AI agents used in AI driven supplier onboarding (continued)

AI agent	AI agent role
	• Identifies these tasks by searching all published Knowledge Base (KB) articles and extracting the tasks from the articles relevant to the supplier's region and industry.

Note: In the approval stage, supplier managers can also approve or reject supplier onboarding using the Yes and No buttons.

Activities in the AI driven supplier onboarding playbook

Activities in the AI driven supplier onboarding playbook

Activity	Description
AI suggested similar suppliers	This activity is triggered when an onboarding request originates from a sourcing request. When a shopper selects an external supplier to fulfill a purchase request, an onboarding request is created automatically to onboard the external supplier. The AI suggested similar suppliers activity analyzes the sourcing request and suggests similar suppliers, eliminating the need to onboard a new supplier. You can select either of the following options to proceed: • Cancel the current onboarding request by selecting the reject button. • Continue with the current onboarding request by selecting the continue button.
AI driven primary data validation	• This activity is triggered during the registration stage to validate banking details submitted by the supplier contact. It cross-references the banking details against the information in the attached proof and highlights any discrepancies. • If Relish is integrated, the supplier's banking information is further validated and synchronized with Relish. • Supplier contacts can auto-populate the bank name, account holder name, and account number fields by selecting the **Extract values from the attachment to auto-populate form fields** checkbox.

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Activities in the AI driven supplier onboarding playbook (continued)

Activity	Description
	Note: In case of discrepancies, supplier managers can reopen the banking information task. Supplier contacts can then update the required information.

The AI agent decision log displays the AI agents that are working to resolve the case, and you can watch their interactions, decisions, and thought processes as they happen in real time.

Related topics

Activate AI agents

Supplier document strategy generator AI agent

Activate AI agents

Activate AI agents individually that you want to make available for the AI driven supplier onboarding.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Under AI agents, select and activate all the AI agents one by one to make them available in the ServiceNow Otto panel.
   - Supplier data steward AI agent
   - Supplier data validator AI agent
   - Supplier approval AI agent
   - Supplier document strategy generator AI agent

   For example, let's assume that you select the **Supplier data steward AI agent**.
3. In the Describe and instruct page, select **Continue**.
   The Describe and instruct page is read-only.
4. In the Add tools and information page, select **Continue**.
   The Add tools and information page is read-only.
5. In the Describe and instruct page, select **Continue**.
   The Describe and instruct page is read-only.
6. In the Define trigger page, select **Continue**.
   The Describe trigger page is read-only.
7. In the Define availability page, switch the **Display** toggle to the open position so that the AI agents are enabled in the ServiceNow Otto panel.
8. To activate the agentic workflow, select **Save and test**.

Result

After agents are activated, agentic workflow must also be activated separately.

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Related topics

- AI driven supplier onboarding using ServiceNow Otto for SLO
- Supplier document strategy generator AI agent

Supplier document strategy generator AI agent

Generate a customized onboarding task list that meets the supplier's compliance and regulatory requirements using the Supplier document strategy generator AI agent.

The Supplier document strategy generator AI agent analyzes all published knowledge base articles using the RAG (Retrieval-Augmented Generation) framework to gather information on compliance and regulation-related tasks. Based on the analysis, the AI agent generates a contextualized list of tasks specific to the supplier's region and industry.

Note: The Supplier document strategy generator AI agent includes a default knowledge base article in the Supplier Knowledge section. This article contains a comprehensive list of compliance and regulatory requirements that suppliers must meet during onboarding based on their industry and region. You can access the knowledge base article from the Supplier Knowledge section.

Automated task list

In the AI driven supplier onboarding workflow, supplier managers are prompted to provide the supplier's location and industry type as inputs on the ServiceNow Otto panel. The AI agent cross-references these inputs with all the published knowledge base articles and identifies the required compliance and regulatory tasks.

Supplier Managers can view the list of tasks identified by the AI agent on the **Playbook** tab. They can remove tasks from this list by clearing the respective check boxes. Supplier Managers can also add new tasks by selecting the **Add item** option. The tasks created are of the type document upload.

Note: Mandatory tasks are grayed out and cannot be edited.

After the tasks are generated, Supplier Managers can update the details of the tasks by adding notes and comments. They can also create tasks manually.

Automate supplier case creation from emails

Emails received from supplier contacts can be automatically converted to supplier cases using the Email Intent to Action Agentic workflow.

The Email Intent to Action Agentic workflow analyzes incoming supplier emails, identifies the email intent, and executes associated actions using the Intent Identification and Intent Executor agents. For more information on the Email Intent to Action Agentic workflow, see Email Intent to Action Agentic Workflow.

Prerequisites for automated creation of supplier cases

To use this functionality, verify that the following steps are completed:

- Configure the [sn_supplier.slm_email] system property and edit the Value field to contain supplier email address. For more information, see Configure properties for Supplier Case Management.
- Deactivate the Create Supplier case for email inbound action. For more information, see Deactivate Create supplier case from email inbound action.
- Activate the Trigger Intent to Action inbound action. For more information, see Enable intent to action workflow from inbound actions.

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Automatic creation of supplier cases workflow

1. When an email arrives in a supplier's inbox, the sender details are verified. If the sender is not a registered supplier contact, an automated reply is sent for registration.
2. If the sender is a registered supplier contact but is mapped to several suppliers, an automated reply is sent to request clarification.
3. The Intent Identification Agent analyzes the inbound email and identifies its intent. Once identified, this intent is mapped to a preconfigured and customized intent within the system. For more information, see Create and associate actions for intent.
4. The Intent Executor Agent creates cases based on the following criteria:
   - If the email contains SLO related queries, a supplier case is created for each of the queries. The cases are assigned automatically to the supplier relationship manager.
   - If the email contains vague information or queries unrelated to SLO, a universal request is created.
   - If the email contains multiple queries, supplier cases are created to resolve SLO related queries and a single universal request is created for other queries.

Related topics

Deactivate Create supplier case from email inbound action

Deactivate Create supplier case from email inbound action

The Create Supplier case for email inbound action must be inactive for automatic creation of supplier cases from emails using ServiceNow Otto.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Inbound Actions**.
2. Select the **Create supplier case from email** inbound action.
3. On the inbound action form, clear the **Active** check box.

Result

The Create supplier case from email inbound action is deactivated.

Summarize a case by using ServiceNow Otto 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 ServiceNow Otto for Supplier Lifecycle Operations (SLO) application.

Before you begin

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: sn_supplier_gen_ai.now_assist_fulfiller

About this task

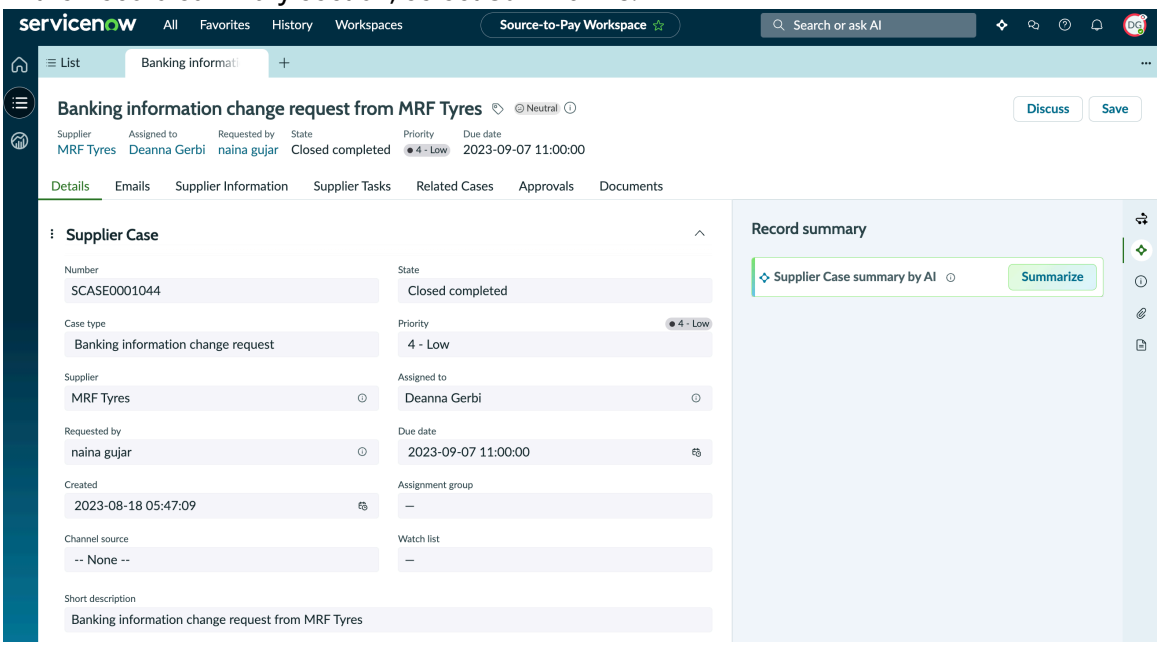
You can use the supplier case summarization skill in either Core UI or Source-to-Pay Workspace.

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- 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 ( ).
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 (only for open cases).
   - **Close notes**: Provides complete summary of case resolution (applicable for closed cases when Advanced Work Assignment for Source-to-Pay Operations is installed).

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.

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Option	Procedure
Save the summary information by adding it to the record work notes	**a.** Select **Share to work notes**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill.
Copy the record summary	Select the copy to clipboard icon ( ) to use the record summary information for another purpose, such as pasting into an email.
View the information about the record summary	If you want to check some details about the summary, select the more info icon ( ).
Refresh the record summary	If you want to refresh the summary, select the refresh icon ( ).

Result
The generated summary appears under the record summary and is saved automatically.

Related topics
- Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)
- Use ServiceNow Otto for Supplier Lifecycle Operations (SLO) in a Virtual Agent chat

Summarize supplier performance in Source-to-Pay Workspace

Generate comprehensive performance summary including overall performance scores, trends, and action items by using the supplier performance summarization skill in the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application.

Before you begin

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: sn_kpi.admin, slm manager

About this task
You can use the supplier performance summarization skill in the Source-to-Pay Workspace in the **KPI Management** tab.

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Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Suppliers** and select the legal name of the supplier for which you want to generate the performance summary.
   The supplier details page is displayed.
4. Under the **KPI management** tab, select **Summarize** to generate the performance summary with ServiceNow Otto.
5. Review the summary details.

   A concise summary includes the overall supplier performance score, trend, performance details, historical context, and next steps. The information that is displayed is based on the KPIs available for the selected supplier.

   - **Supplier performance score**: Latest overall supplier performance score calculated from the weighted average scores of all KPIs.
   - **Trend**: KPI failure patterns over time, performance trends, and recurring areas of concern.
   - **Performance details**: Lists all the failing KPIs, failing KPIs in action plans, and at-risk KPIs.
   - **Historical context**: Lists the number of action plans created, targets achieved, and previous focus areas.
   - **Steps ahead**: Lists the actions that the supplier managers must take next.

Analyze sentiments in supplier cases

Use the Sentiment Analysis skill in ServiceNow Otto for Supplier Lifecycle Operations (SLO) to analyze a requester's response and determine the sentiment and sentiment trend associated with a supplier case. You can gauge the urgency of a supplier case and prioritize your responses based on the sentiment analysis.

Before you begin

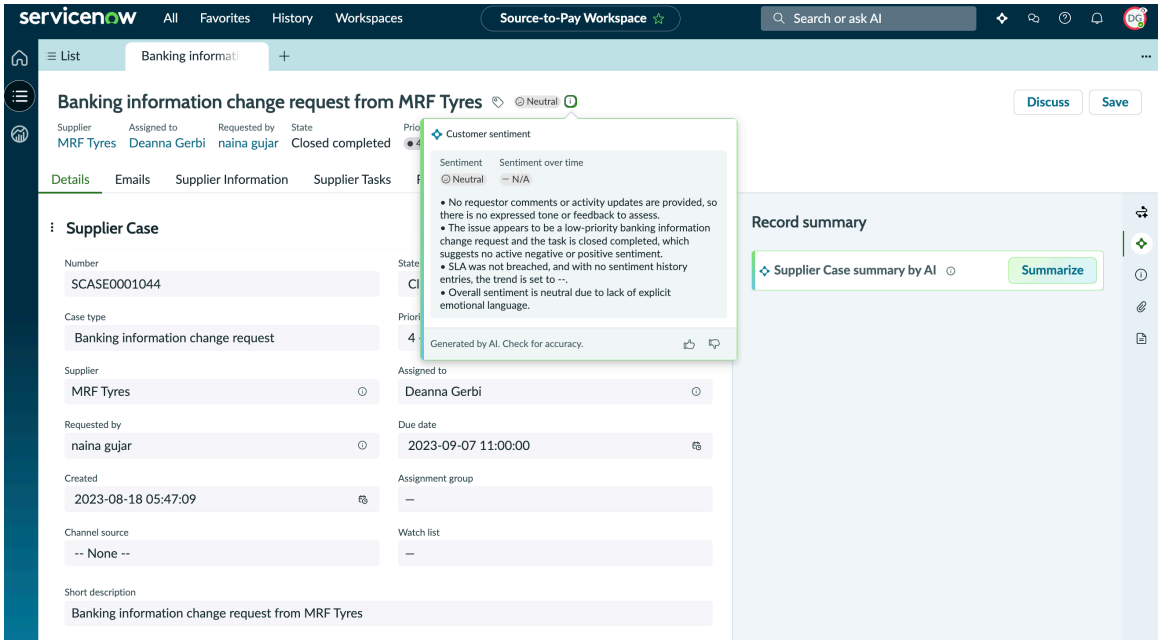
Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default .

Role required: sn_supplier_gen_ai.now_assist_fulfiller and sn_slm.fulfiller

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon .
3. Go to **Cases** > **Open**.
4. Select a supplier case.
   The case detailed view appears.
5. Select the information icon to view the reasoning behind the generated sentiment.

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6. **Optional:** Manually refresh the sentiment analysis.

   a. Selecting the information icon .

   b. View the updated sentiment analysis by selecting the refresh icon .

Related topics

- Generate an email response for supplier cases
- Summarize supplier performance in Source-to-Pay Workspace
- Automate supplier case creation from emails

Generate an email response for supplier cases

Generate an email response for supplier cases.

Before you begin

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: sn_supplier_gen_ai.now_assist_fulfiller and sn_slm.fulfiller

About this task

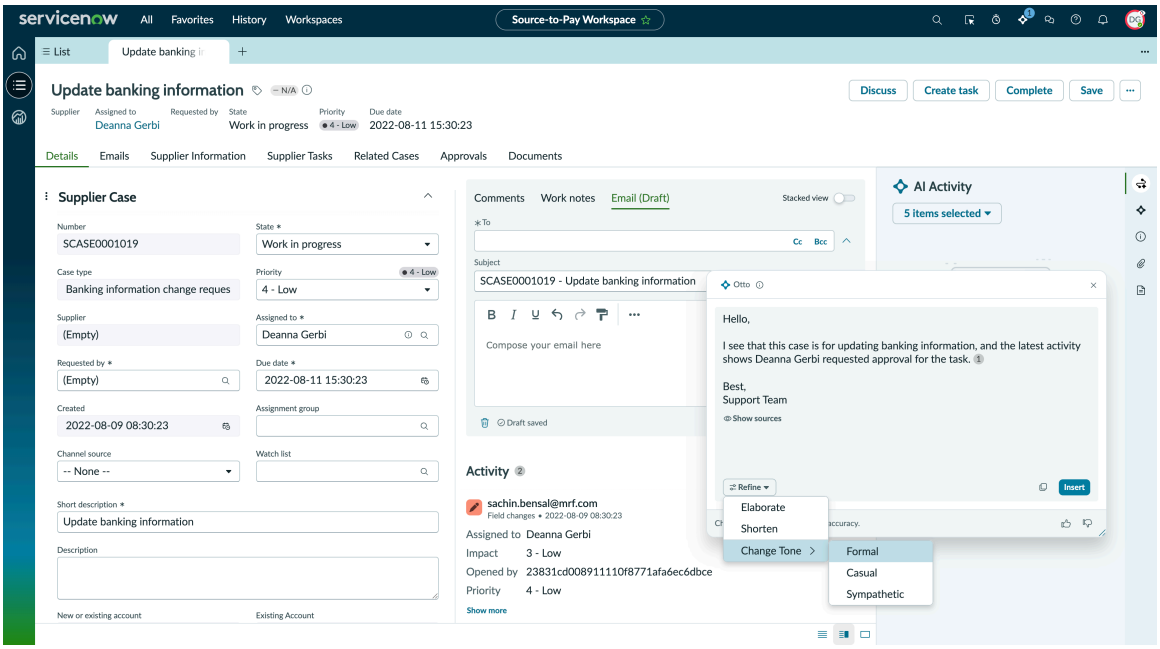
The Email response for supplier case skill uses supplier case details such as case type, short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles to compose an email response. You can also use this skill to elaborate, shorten, or change the tone of your email draft.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon .
3. Go to **All work** > **Cases**.

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4. Select a supplier case.
   The case detail view appears.
5. Go to the **Email** tab.



6. Select anywhere within the email body textbox.
7. Generate an email draft by selecting the ServiceNow Otto icon ✨.
8. Select **Insert**.
9. **Optional:** Elaborate, shorten, or change the tone of an email body.
   a. Select the required content.
   b. Select the ServiceNow Otto icon ✨.
10. **Optional:** Apply templates by selecting the template icon  .

Result
An AI generated email draft is created.

Related topics
- Generate an email response for supplier tasks
- Automate supplier case creation from emails
- Analyze sentiments in supplier cases

Generate an email response for supplier tasks
Generate an email response for supplier tasks.

Before you begin
Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: sn_supplier_gen_ai.now_assist_fulfiller and sn_slm.fulfiller

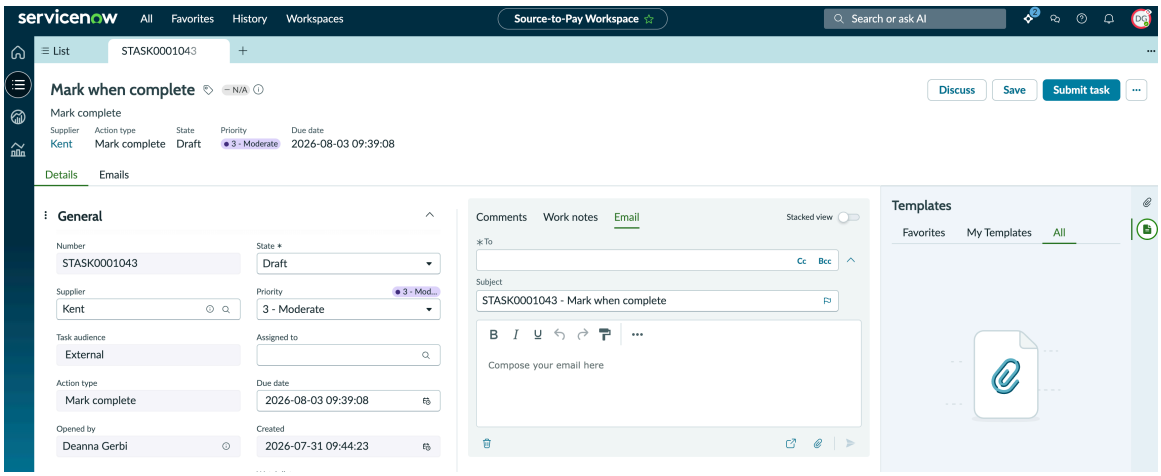
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About this task

The Email response skill uses supplier task details such as task type, short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles to compose an email response. You can also use this skill to elaborate, shorten, or change the tone of your email draft.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon .
3. Go to **Tasks** > **Open**.
4. Select a supplier task.
   The task detail view appears.
5. Go to the **Email** tab.



6. Select anywhere within the email body textbox.
7. Generate an email draft by selecting the ServiceNow Otto icon .
8. Select **Insert**.
9. **Optional:** Elaborate, shorten, or change the tone of an email body.
   a. Select the required content.
   b. Select the ServiceNow Otto icon .
10. **Optional:** Apply templates by selecting the template icon .

Result

An AI generated email draft is created.

Generate a knowledge article from a closed supplier case

Generate a draft knowledge article from a closed supplier case using ServiceNow Otto for SLO, then review and publish it to the knowledge base.

Before you begin

- The supplier case must be in the **Closed Completed** state with no existing knowledge article linked to it.
- Source-to-Pay Workspace must be configured with knowledge article generation enabled.

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Note: AI-generated content may contain inaccuracies. Review and verify all generated articles before publishing.

Role required: sn_supplier_gen_ai.now_assist_fulfiller

About this task

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) to view your cases.
3. Open a closed supplier case assigned to you.
4. Select **Create Knowledge**.
   This option appears only when the case has no associated knowledge article.
5. In the dialog box, select **Draft with AI**.
   If additional relevant tasks exist, they appear. You can select up to five tasks to include in the knowledge article.
6. Select the tasks to include in the knowledge article.
   a. Select the tasks you want to include, then select **Continue with selected tasks**.
   b. Select **Continue without more tasks** to proceed without additional tasks.
   The generated article opens in a new tab with a unique ID and is automatically linked to the supplier case.
7. Review the article and edit as needed.
   Verify the accuracy of all AI-generated article content.
8. Select **Save**.
9. Select **Publish**.
   A confirmation message appears.

Result

The published knowledge article is linked to the supplier case and added to the knowledge base.

Trouble?

If the article generation fails, an error message appears. Verify that knowledge article generation is configured correctly and try again. If the issue persists, contact your administrator.

Generate a knowledge article from multiple closed cases

Generate a draft knowledge article from multiple closed supplier cases using ServiceNow Otto for SLO, then review and publish it to the knowledge base.

Before you begin

- The supplier cases must be in the **Closed Completed** state with no existing knowledge article linked to them.
- Source-to-Pay Workspace must be configured with knowledge article generation enabled.

Note: AI-generated content may contain inaccuracies. Review and verify all generated articles before publishing.

Role required: sn_supplier_gen_ai.now_assist_fulfiller

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About this task

Generate a knowledge article from multiple related closed supplier cases to create comprehensive documentation that address common issues. This workflow builds your knowledge repository from a set of closed cases rather than one case at a time.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Supplier Knowledge** > **Create new article**.
   The **Use AI to draft this article** modal opens.
2. Select **Draft with AI**.
3. Select the case type from the list.
   By default **Supplier Case** is selected.
4. In the **Search from tasks** field, enter keywords to find cases.
   Cases matching your search criteria appear in the results list.
5. Select the cases you want to combine into a single knowledge article.
   You can select multiple cases that address similar issues or solutions.
6. Select **Continue with selected tasks**.
   ServiceNow Otto generates article content based on the selected cases.
7. Review and edit the generated article content.
   Verify the accuracy of all AI-generated content before publishing. The article combines information from all selected cases.
8. Select **Submit**.
   A message appears indicating that the knowledge article is saved as a draft and linked to all selected cases.
9. Select **View Article** to open the draft article.
10. Make any final edits to the article.
11. Select **Publish**.
    A success message appears indicating the article is published.

Result

The published knowledge article is linked to all selected cases and available in the knowledge base.

Trouble?

If the article generation fails, an error message appears. Verify that knowledge article generation is configured correctly and try again. After the article generation process starts, it can't be stopped. Generation continues even if you close the modal.

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO) in a Virtual Agent chat

Use the conversational interface of ServiceNow Otto for Supplier Lifecycle Operations (SLO) to request contextually relevant generative AI capabilities through a Virtual Agent chat.

Role required: sn_supplier_gen_ai.now_assist_supplier

Note: This role must be provided to the sn_slm.contact user.

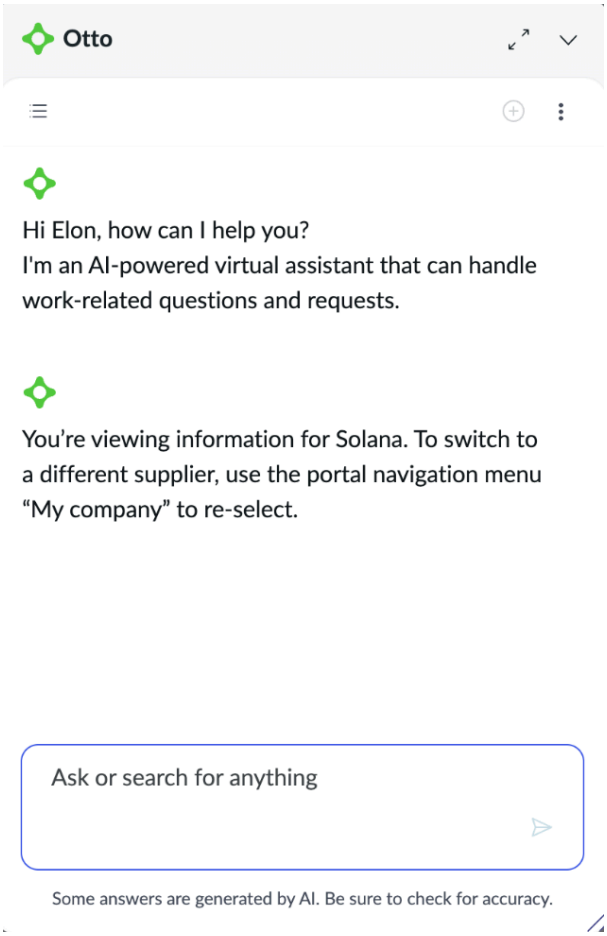
As a supplier, you can manage a profile, manage users, submit a request, track request status, or connect to a live agent by using contextual generative AI capabilities.

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Note: ServiceNow Otto for SPO uses generative AI to interpret your requests and generate responses. Results may not always be accurate. Review any procurement information before submitting a request.

Start a conversation with ServiceNow Otto for SLO

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Supplier Collaboration Portal**.
2. Select the Virtual Agent chat icon ( ).
3. In the chat, select a suggested topic or type what you need.



Update banking details

As a supplier contact, you can update your existing bank details or submit a new one. You can enter the email address that is associated with your organization's account to update your bank details. You must upload proof of the beneficiary's bank account to edit the request.

Update profile details

As a supplier contact, you can update the profile details. You can update the profile details and enter the profile details that you want to update. Follow the prompts in the chat to complete the procedure.

Submit a request

As a supplier contact, you can submit a request. You can enter `Supplier inquiry` in the chat, describe the case, and select a supplier contact from the list to create a request.

Track request status

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As a supplier contact, you can track a request status. For example, enter `I want to know the status of SCASE0001156` in the chat to view the status of the request.

Enroll a new user

As a supplier contact, you can enroll a new user. You can enter the work email address of the new user and select if you want this new user as the primary contact.

Remove user account

As a supplier contact, you can remove a user account. You can enter the name of the user or the email address of the user account that you want to remove. Enter the email address of the user who will take over the tasks that were delegated to the removed user. You must also provide a reason for offboarding this user.

Request access change

As a supplier contact, you can request an access change.

Note: Only a secondary contact can request an access change.

Select the urgency of the access change, such as low, moderate, or high. Enter the reason for requesting the access change from secondary to primary.

Additional Information

ServiceNow Otto in Virtual Agent provides your users with an interactive generative AI experience. A friendly, natural language conversation is easier to understand and makes supplier contacts more comfortable with talking to a bot. To learn how a conversation that is powered by generative AI might look in Virtual Agent, see Using ServiceNow® Otto for Virtual Agent.

As an administrator, you can use the ServiceNow Otto in Virtual Agent Analytics dashboard to monitor the performance of ServiceNow Otto in Virtual Agent as a self-service deflection tool. ServiceNow Otto in Virtual Agent Analytics calculates the conversation deflection rate that is based on the resolution status associated with ServiceNow Otto query responses.

For detailed information on ServiceNow Otto in Virtual Agent in general, and ServiceNow Otto for SLO in particular, see Explore ServiceNow Otto for Supplier Lifecycle Operations (SLO).

For information on configuring ServiceNow Otto for SLO, see Configure ServiceNow Otto for Supplier Lifecycle Operations (SLO).

Related topics

Use ServiceNow Otto for Supplier Lifecycle Operations (SLO)

Summarize a case by using ServiceNow Otto for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace

AI L1 SLO Service Desk Specialist

The AI L1 SLO Service Desk Specialist is a fully autonomous help desk automation solution that resolves supplier inquiries without manual intervention from a fulfiller.

AI L1 SLO Service Desk Specialist overview

When a supplier contact submits a general inquiry case, the AI L1 SLO Service Desk Specialist retrieves relevant information from published knowledge base articles and the FSC Common KG Tags added under the Enterprise knowledge graph to investigate the issue. If the specialist determines that the case can be resolved, it posts the resolution in the Activity section and closes the case. If the specialist cannot resolve the case with sufficient confidence, it reassigns the case to a fallback assignment group for human follow-up.

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Note: By default, the AI L1 SLO Service Desk Specialist resolves only the general inquiry case type.

Prerequisites

To access the AI L1 SLO Service Desk Specialist, you must have the following plugins installed:

- ServiceNow Otto for SLO plugin (com.snc.sn_supplier_gen_ai)
- Zero Touch Service Desk plugin (com.snc.sn_ztsd)

AI L1 SLO Service Desk Specialist workflow

The following steps describe how the AI L1 SLO Service Desk Specialist processes a general inquiry case.

1. **Supplier contact raises a general inquiry case**: The supplier contact submits a general inquiry through the Supplier Collaboration Portal or by sending an email. For more information on submitting supplier inquiries, see Raising requests from the Supplier Collaboration Portal.
2. **Case assigned to the AI L1 SLO Service Desk Specialist**: An assignment rule automatically assigns the case to the AI L1 SLO Service Desk Specialist.
3. **Fetch case details**: The agent retrieves the case information to evaluate the context of the inquiry.
4. **Query knowledge sources**: The agent searches published knowledge base articles and the FSC Common KG Tags knowledge graph for relevant guidance, such as supplier onboarding guidelines. For more information on knowledge graphs, see Knowledge Graph.
5. **Generate a resolution**: The agent provides a resolution and lists helpful reference links in the **Resolution Notes** section. This gives the requester quick access to related documentation and solutions that support the resolution. This resolution is visible to the supplier contact on the Supplier Collaboration Portal.
6. **Evaluate confidence and update case state**:

   The agent acts based on the confidence score of the search results:

   - Score above 70%: The case state changes to **Awaiting Acceptance**. The resolution is sent to the requester for acceptance and the case switches to read-only mode.
   - Score at or below 70%: The agent sets the request state to **Draft** and the case is reassigned to the fallback assignment group for human follow-up. The default assignment group is Supplier Administrators.
7. **Resolution acceptance or rejection by the supplier contact**:

   The supplier contact receives the resolution by email and can also view it under **My Tasks** on the Supplier Collaboration Portal.

   - If the supplier contact accepts the resolution, the case is closed and marked as **Closed Complete**.
   - If the supplier contact rejects the resolution, the case status changes to **Work in Progress** and the supplier case is escalated to a support engineer for human follow-up.
   - If the supplier contact does not respond within 72 hours, a scheduled job runs daily to identify such cases and close them as closed complete.

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Escalation to a human agent

The AI L1 SLO Service Desk Specialist automatically escalates a case and returns it to a draft state in the following scenarios:

- The agent does not identify a resolution for the contact's question.
- The number of exchanges between the agent and the supplier contact exceeds the configured limit.

View AI L1 SLO Service Desk Specialist progress

View the step-by-step progress made by AI L1 SLO Service Desk Specialist on a case record in the contextual side panel.

Before you begin

Role required: sn_slm.fulfiller

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon.
3. Open a general inquiry case that is assigned to AI L1 SLO Service Desk Specialist.
4. In the contextual side panel, select the Agentic Processes icon.
5. Select **Zero Touch Service Desk Agent** to view the details of the agent's work.
6. Select **Show steps** to view the agent's progress.
7. In the **Review output** section, view the generated response.

Edit Knowledge Graph Tags

Customize instructions used by the AI L1 SLO Service Desk Specialist to retrieve information by editing the FSC Common Knowledge Graph tags.

Before you begin

Role required:kg_admin

About this task

FSC Common KG Tags is a collection of tables that help AI L1 SLO Service Desk Specialist evaluate the context and content of different tables. You can edit these tags to add or update tables, table synonyms, column descriptions, and other instructions to improve the accuracy of AI responses.

Procedure

1. Navigate to **All** > **Knowledge Graph Designer** > **Enterprise Graph Tags**.
2. Select **FSC Common KG Tags** to open it in the Knowledge Graph canvas.
   The canvas displays all tables that are part of the tag.
3. Select a tag for editing.
   - To edit the tag, select **Edit tag**.
   - To edit a node, select the node. The Tag configuration section appears in the right pane.
4. Update the tag details as needed, including table synonyms, column names, and instructions.
   Instructions you add help the AI L1 SLO Service Desk Specialist interpret the context of the table when processing supplier inquiries.
5. Select **Update Tag** to save your changes.

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Explore 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:

- 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.

- Supplier payment optimization: Supplier managers can view the potential returns or savings when a supplier accepts commercial credit card payments. They can convert high-potential suppliers, and capture value through card-based payments.

For more information about installing and configuring Supplier Lifecycle Operations, see Configure Supplier Lifecycle Operations.

Supplier Lifecycle Operations applications

Supplier Lifecycle Operations includes the following applications.

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Supplier Lifecycle Operations applications

Application	Description
Supplier Case Management	The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.
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	Enables you to centralize supplier information and collaborate with suppliers to improve performance. **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.
Supplier Collaboration Portal	Provides a single, one-stop experience for suppliers to get self-service, complete tasks and make requests into an organization.
Supplier Operations	Provides advanced case management capabilities to handle key supplier lifecycle events such as onboarding, offboarding, and ongoing operations.
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 Payment Optimization	Enables supplier managers to view the potential returns or savings when suppliers accept commercial credit card payments. They can convert high-potential suppliers, and capture value through card-based payments.
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.
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.
Craft.co Integration for Supplier	Provides a preconfigured integration with Craft.co. Craft.co is a supplier intelligence platform that offers validated and comprehensive information about suppliers with which a company engages.

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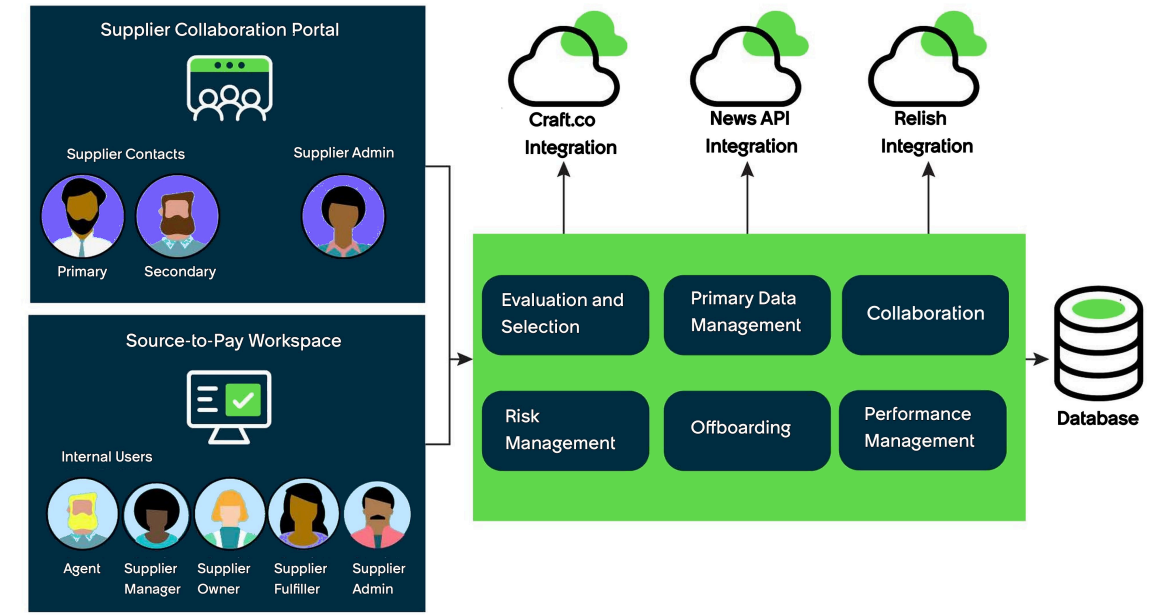
Supplier Lifecycle Operations applications (continued)

Application	Description
Lifecycle Operations	
Relish Integration for Supplier Lifecycle Operations	Helps in validating supplier data while working on supplier cases for banking information change requests, supplier location change requests, and conducting sanction screening.

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



Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the https://www.servicenow.com/docs/access?context=supplier-lifecycle-operations-rn-static&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SLO Implementation Essentials and more, from ServiceNow University.

ServiceNow Community

Connect with other Supplier Lifecycle Operations users at ServiceNow Community.

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Supplier Common Architecture

The Supplier Common Architecture application (com.snc.sn_slm) contains tables of the Supplier Case Management application that can be commonly used and extended by other products. The Supplier Common Architecture application also contains the roles required for the Supplier Case Management application.

The Supplier Case Management 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 Case Management 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)

Related topics

Supplier Case Management

Supplier Collaboration Portal

Supplier Operations

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.

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 Brazil 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 Brazil 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.

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Related topics

- Supplier Operations
- Install Supplier Operations
- Supplier Common Architecture

Supplier Case Management

The Supplier Case Management application (com.snc.sn_supplier_mgmt) logs and tracks all supplier-related cases and tasks. It also provides support for Advanced Work Assignments and the ability to resolve cases via playbooks.

Important:

- Check your entitlements to determine whether you have access to Supplier Case Management.
- Supplier Case Management is the new name for Supplier Lifecycle Operations plugin (com.snc.sn_supplier_mgmt) from Brazil release.

The Supplier Case Management application (com.snc.sn_supplier_mgmt) provides basic case management capabilities for supplier-related cases. The supplier cases can be created through various channels such as Workspace, email, and other supported methods. The application also supports task creation and tracking, enabling users to manage and resolve supplier issues more efficiently.

Supplier Case Management has the following plugin dependencies:

- Supplier Common Architecture (com.snc.sn_slm)
- Source-to-Pay Workspace (com.sn_spend_workspace)

For more information about installing and configuring Supplier Case Management, see Install Supplier Case Management.

Related topics

- Supplier Common Architecture
- Source-to-Pay Workspace
- Advanced Work Assignment for Supplier Lifecycle Operations
- Using Source-to-Pay Workspace

Supplier Collaboration Portal

The ServiceNow® Supplier Collaboration Portal application provides a seamless unified employee portal experience for supplier contacts.

Important: Check your entitlements to determine whether you have access to this feature.

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

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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:

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 selecting **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.

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Options on the Supplier Collaboration Portal header (continued)

Option	Description
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.
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.

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Supplier Collaboration Portal widgets (continued)

Widget	Description
	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.
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 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.

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Supplier Collaboration Portal widgets (continued)

Widget	Description
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.

Related topics

- Supplier Common Architecture
- Raising requests from the Supplier Collaboration Portal
- Managing supplier contacts from the Supplier Collaboration Portal
- Viewing supplier contact tasks from the Supplier Collaboration Portal
- Install Supplier Collaboration Portal

Supplier Operations

Supplier Operations provides advanced case management capabilities to handle key supplier lifecycle events such as onboarding, offboarding, and ongoing operations.

Important:

- Check your entitlements to determine whether you have access to Supplier Operations.
- Supplier Operations application (com.snc.sn_so) is the mandatory plugin to be installed after upgrading to Supplier Lifecycle Operations Brazil release.

The **Supplier Operations** application (com.snc.sn_so) provides the following capabilities:

- Case management for:
  - Handling supplier onboarding and offboarding, and ongoing operations.
  - Handling supplier lifecycle ongoing operations.
  - Resolving cases via Playbooks for a structured and consistent approach.
- Integrations with third-party solutions such as Craft and Relish.
- Access to Document Management and Segmentation Rules.

To install Supplier Operations, the following plugins have to be installed:

- **Required plugin**: Supplier Operations (com.snc.sn_so)
- **Dependent plugins**:
  - Supplier Case Management (com.snc.sn_supplier_mgmt)
  - Document Management (com.snc.platform_document_management)

For more information about installing Supplier Operations, see Install Supplier Operations.

Related topics

- Supplier Case Management
- Source-to-Pay Workspace

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Use the supplier onboarding playbook to onboard suppliers

Manage supplier cases from the Source-to-Pay Workspace

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.

Important: Check your entitlements to determine whether you have access to Supplier Relationship and Performance Management.

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.

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.
- **Automated KPI data collection**: By providing a comprehensive, automated KPI system integrated into action plans to meet user expectations for performance monitoring.

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)
  - Supplier Operations (com.snc.sn_so)
  - Gantt Component for ServiceNow (com.servicenow_now_gantt)

To enable the Automated KPIs feature after an upgrade, run the fix scripts **KPI - Dec 25 records script** and **KPI - Dec 25 data records script**. For more information, see Run fix scripts to enable Automated KPI collection.

For more information about configuring Supplier Relationship and Performance Management, see Configure Supplier Relationship and Performance Management.

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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.

Related topics

- Configure Supplier Relationship and Performance Management
- Using Supplier Relationship and Performance Management
- Supplier Relationship and Performance Management reference

Supplier Payment Optimization

Supplier managers can view the potential returns or savings when suppliers accept credit card payments. They can convert high-potential suppliers, and capture value through card-based payments.

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

The Supplier Payment Optimization (com.snc.sn_slm_opt) application enables suppliers managers to estimate potential savings from credit card payments, which can result in significant cost savings for the company. It provides a Supplier Payment Optimization dashboard that provides an overview of the total potential savings for all suppliers.

Supplier Payment Optimization offers the following key benefits:

- **Estimate savings**: Estimate savings and returns associated with card acceptance by the suppliers.
- **Effective expense tracking**: Compare actual expenses with the data available on the dashboard on monthly, quarterly, yearly, and all-time spend.
- **Drive conversion of high-potential suppliers**: Identify, prioritize, and track suppliers with high acceptance potential.
- **Stronger supplier relationships**: With more suppliers accepting credit card payments, timely and reliable payments help build trust and may lead to better pricing or priority service.

Supplier Payment Optimization offers the following capabilities:

- **Saving estimator tool**: The saving estimation tool can be used to calculate potential savings from credit card payments. The tool uses default values and enables users to modify billing cycles and other parameters to create new estimates. For more information, see Estimate savings using the saving estimator tool.
- **Propensity score**: Supplier managers can check the propensity score (currently requires manual updates) before proceeding with raising the new supplier credit card enablement journey. For more information, see Add propensity score for a supplier.
- **Credit card enablement**: Supplier Managers can initiate credit card enablement cases, enabling suppliers to use a credit card as their preferred payment method. For more information, see Create a case for supplier credit card enablement.
- **Payment optimization dashboard**: The dashboard includes data on the all-time spend and total spend for the current month, current quarter, and current year. It also lists the top 10 supplier opportunities based on the saving estimates generated using the saving estimation tool. For more information, see View the Payment Optimization dashboard.

To install Supplier Payment Optimization, the following plugins have to be installed:

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- **Required plugin**: Supplier Payment Optimization (com.snc.sn_slm_opt)
- **Dependent plugins**:
  - Supplier Operations (com.snc.sn_so)
  - Source-to-Pay Workspace (com.sn_spend_workspace)
  - Source-to-Pay Common Architecture (com.snc.sn_shop)

For more information, see Install Supplier Payment Optimization.

For more information about using Supplier Payment Optimization, see Using Supplier Payment Optimization.

For more information about Supplier Payment Optimization data model and primary tables, see Supplier Payment Optimization reference.

Related topics

Supplier Common Architecture

Source-to-Pay Workspace

Smart Assessments

Supplier managers can configure smart assessments in bulk for internal and external users.

Supplier managers use the segmentation rules and assessment templates to create smart assessments in bulk for users. Smart assessments provide a survey-like experience with enhanced UI capabilities. This feature utilizes the capabilities of the Smart Assessment Engine application. Assessments can be created for internal and external users:

- Internal users (supplier owners/managers) respond to the assessment through the Source-to-Pay Workspace.
- External users (supplier contacts) receive emails with a link to the assessment and respond through the Supplier Collaboration Portal.

Note: Users can reassign the assessments based on the reassignment configuration. For more information, see Configure user criteria for reassigning assessments.

For more information about how to configure smart assessments, see Configure smart assessments.

Universal Request

The Universal Request feature enables supplier contacts to raise issues that do not fit into predefined case types or involve multiple departments. It provides a structured workflow for routing and resolution of queries.

You must install the Universal Request for Source-to-Pay Operations plugin [sn_fsc_ur_common] to enable the Universal Request feature in SLO. For more information on installing the plugin, see Install Universal Request for SLO.

Key Stakeholders

The Universal Request workflow involves the following stakeholders:

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- Supplier contacts: Supplier contacts submit their queries by raising Universal requests.
- Routing agents: Routing agents are tier-1 agents who manage both Universal requests and supplier cases. These agents have both the Universal Request role and the [sn_slm.agent] role. Routing agents can perform the following operations:
  - View, update, transfer, and close Universal requests
  - Create supplier cases from Universal requests

Note: You can create Routing agents by adding users to the Source Operations Universal Request Group. This group is a default assignment group that contains Universal request roles and supplier agent roles. For more information on assigning roles, see Assign roles to UR users.

For more information on roles in Universal requests, see Universal Request roles and groups.

Universal Request workflow

1. Submission of a Universal request

   The supplier contact submits a Universal request from the Supplier Collaboration portal. For more information on raising a Universal request, see Create a Universal Request from the Supplier Collaboration Portal.

2. Assignment of the Universal request
   - For requests that are marked as sensitive, suppliers select the department at the time of request submission. The request is assigned automatically to the corresponding assignment group.

     Note: Suppliers can mark a Universal request as sensitive by selecting the **Issue contains sensitive or confidential information** check box while submitting the request form. For more information, see Create a Universal Request from the Supplier Collaboration Portal.

   - For requests that aren't marked as sensitive, routing agents review the request and route them to an appropriate assignment group based on the information provided in the description and short description by the supplier.
3. Primary ticket creation
   - For requests that are marked as sensitive, a primary ticket of the type supplier case is created automatically.
   - For requests that aren't marked as sensitive, routing agents must create a supplier case for resolution. For more information, see Create supplier case from Universal Request.

     Note: Routing agents can also create an invoice case instead of a supplier case from a Universal request if they have the required permissions.

4. Resolution of the Universal request
   - If the routing agent accepts the resolution provided in the primary ticket, the Universal request is marked as complete and closed.
   - If the resolution is rejected, the supplier case is dissociated from the Universal request. The routing agent then creates a new primary ticket from the Universal request for resolution.

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Primary tickets can also be transferred to other departments when resolving a Universal request requires cross-departmental support or must be reassigned to a different department. For more information on transferring primary tickets, see Transfer a primary ticket.

When a Universal request needs support from multiple departments, you can create Associated tickets in addition to the primary ticket. Associated tickets enable multiple departments to work on the resolution of the Universal request simultaneously. For more information see, Create associated ticket for primary ticket of UR.

Related topics

Create a Universal Request from the Supplier Collaboration Portal

Create supplier case from Universal Request

Configure Supplier Lifecycle Operations

Plan and configure your implementation for Supplier Lifecycle Operations.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Install Supplier Case Management

Install the Supplier Case Management application (com.snc.sn_supplier_mgmt) and its dependencies from ServiceNow Store to enable supplier case logging and tracking.

Before you begin

Important: Check your entitlements to determine whether you have access to Supplier Case Management.

- 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 Case Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Supplier Case Management application (com.snc.sn_supplier_mgmt) installs the following dependent plugins.
  - Supplier Common Architecture (com.snc.sn_slm)
  - Source-to-Pay Workspace (com.sn_spend_workspace)

Role required: admin

About this task

The following items are installed with Supplier Case Management:

- Plugins
- Store applications
- Roles
- Tables

For more information, see Components installed with Supplier Case Management.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Supplier Case Management 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.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for 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 Case Management

Several types of components are installed with activation of Supplier Case Management, including tables and user roles.

The user roles and tables, even though installed along with Supplier Case Management, reside in the Supplier Common Architecture application. For more information, see Supplier Common Architecture.

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

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.

Roles in Supplier Case Management

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

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Roles in Supplier Case Management (continued)

Role title [name]	Description	Contains roles
		• 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 • Update 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 • 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	• personalize_responses • workspace_user • canvas_user • sn_slm.fulfiller • sn_fin.finance_user • sn_fin.procurement_user • sn_vdr_risk_asmt.vendor_assessment_reviewer

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Roles in Supplier Case Management (continued)

Role title [name]	Description	Contains roles
	Note: The Supplier Owner [sn_slm.owner] role can create, manage, and edit records for only the suppliers that they own.	
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 • 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	• sn_slm.owner • dm_user_criteria_read
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	• sn_fin.supplier_payment_info_read • snc_external

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Roles in Supplier Case Management (continued)

Role title [name]	Description	Contains roles
	• Complete assigned tasks using the Supplier Collaboration Portal **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

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.

Tables in Supplier Case Management

Table	Description
Supplier Case [sn_slm_case]	Stores the supplier case records. Extends the Service Case [sn_spend_sdc_service_request] table.
Supplier Product Code [sn_slm_code_m2m_supplier]	Stores the relationships between suppliers in the Supplier [sn_fin_supplier] table and product codes in the Product Code [sn_supplier_product_code] table.
Supplier Email Domain [sn_slm_email_domain]	Stores the email domains of the suppliers.
Supplier Location [sn_slm_m2m_location]	Stores the relationships between suppliers stored in the Supplier [sn_fin_supplier] table and locations stored in the Location [cmn_location] table.
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.

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Tables in Supplier Case Management (continued)

Table	Description
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.

Related topics

- Application plugin installation sequence in Supplier Case Management
- Explicit Roles in Supplier Case Management

Explicit Roles in Supplier Case Management

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 Case Management. Supplier Case Management is dependent on the Explicit Roles [com.glide.explicit_roles] plugin.

For more information about ServiceNow AI Platform explicit roles, see Explicit Roles.

Related topics

- Components installed with Supplier Case Management
- Application plugin installation sequence in Supplier Case Management
- Configure properties for Supplier Case Management

Application plugin installation sequence in Supplier Case Management

The following table provides the list of plugins for Supplier Case Management, a high-level description of each plugin, and the dependencies that are required before installing each plugin.

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Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Supplier Case Management application plugin list

Sequenc	Plugin name	Description	Plugin dependencies
1	Supplier Common Architecture [com.snc.sn_slm]	Provides a common architecture to track data objects related to a supplier used in both Supplier Case Management and Supplier Collaboration Portal.	• Finance Common Architecture (com.sn_fin) • Service Delivery Common (com.sn_spend_sdc) • External User Registration (com.snc.external_user_self_registra • Common Vendor Core (com.snc.sn_vendor_core) and (com.snc.vendor_core)
2	Supplier Case Management [com.snc.sn_supplier_mgmt] Plugin scope name: sn_supplier	Onboard suppliers, manage supplier relationships, monitor risk, compliance, and performance across the supplier life cycle.	• Supplier Common Architecture (com.snc.sn_slm) • Source-to-Pay Workspace (com.sn_spend_workspace)
3	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)
4	Supplier Operations [com.snc.sn_so]	Provides advanced case management capabilities to handle key supplier lifecycle events such as onboarding, offboarding, and ongoing operations.	Document Management (com.snc.platform_document_manag

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Supplier Case Management application plugin list (continued)

Sequenc	Plugin name	Description	Plugin dependencies
5	Craft.co Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_craft]	Provides pre-configured integration with Craft.co. Craft.co is a supplier intelligence platform that offers validated and comprehensive information about suppliers with which a company engages.	Supplier Operations(com.snc.sn_so)
6	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.	Supplier Operations(com.snc.sn_so)
7	SLO Connector for Relish Data Assure [x_reliq_slo_connec]	Provides pre-configured integration with Relish. Relish is a supplier intelligence platform that helps in validating supplier data with confidence.	• Source-to-pay integration framework (sn_spend_intg) • Relish Data Assure (x_reliq_relish_dat)
8	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 Case Management (com.snc.sn_supplier_mgmt)

Supplier Case Management 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)

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3. Supplier Case Management (com.snc.sn_supplier_mgmt)
4. (Optional) Craft.co Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft)
5. (Optional) SLO Connector for Relish Data Assure (x_reliq_slo_connec)
6. (Optional) Advanced Work Assignment for Supplier Lifecycle Operations (com.snc.sn_slm_awa)

Related topics

Components installed with Supplier Case Management

Explicit Roles in Supplier Case Management

Application plugins for AI capabilities in SLO

View the consolidated list of plugins required to use AI capabilities for supplier case management in Supplier Lifecycle Operations.

Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Application plugin list

Bundle	Application	Plugin dependencies
Prime	SLO - Prime (app-supplier-gen-ai-prime) Scope name: sn_ai_slo_prime	• Supplier Operations (scope name: sn_so) • SLO - Foundation (scope name: sn_ai_slo_fdn) • Finance and Procurement - Prime (scope name: sn_ai_fsc_prime)
Foundation	SLO - Foundation (app-supplier-gen-ai-foundation) Scope name: sn_ai_slo_fdn	• ServiceNow Otto for Supplier Lifecycle Operations (SLO) (scope name: sn_supplier_gen_ai) • Finance and Procurement - Foundation (scope name: sn_ai_fsc_fdn)
	ServiceNow Otto for Supplier Lifecycle Operations (SLO) (app-supplier-gen-ai) Scope name: sn_supplier_gen_ai	• ServiceNow Otto for Platform (scope name: sn_genai_platform) • ServiceNow Otto for Finance and Procurement (scope name: sn_fsc_genai) • Supplier Case Management (scope name: sn_supplier)

Prerequisites for upgrading Supplier Case Management 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

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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.

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 Case Management. 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.

Related topics

- Components installed with Supplier Case Management
- Explicit Roles in Supplier Case Management
- Configure properties for Supplier Case Management

Configure properties for Supplier Case Management

Use these properties to configure settings for the Supplier Case Management application from the Properties page.

Navigate to **All** > **Supplier Case Management** > **Properties**.

Note: The Properties page displays the properties for Craft only if you have installed the Craft.io integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft) plugin.

Select the question mark icon ( ) beside each property field to see the property name corresponding to that field.

Supplier Case Management properties

Property	Action
Supplier Case Management 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.

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Supplier Case Management properties (continued)

Property	Action
	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.
Enable acceptance flow for supplier cases. *sn.slm.isAcceptedFlowEnabled*	If enabled, supplier cases can be closed only if the supplier contact accepts the case resolution. While waiting for the supplier contact's response, the case state changes to **Awaiting acceptance** and an email with the resolution details is sent to the supplier contact. If not enabled, supplier cases can be closed without requiring acceptance from the supplier contact. For more information, see Complete a supplier case from the Source-to-Pay Workspace.
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.
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.

Related topics

- Components installed with Supplier Case Management
- Explicit Roles in Supplier Case Management
- Application plugin installation sequence in Supplier Case Management

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.

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Before you begin
Role required: sn_slm.admin

About this task
Supplier Case Management 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 Case Management.

If you use the automatic case creation functionality in both Supplier Case Management (SCO) 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 Case Management** > **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.

Related topics
Email format for contacts linked with multiple suppliers

Enable deprecated case types after upgrade

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:

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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.

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.

Related topics

- Enable automatic creation of supplier cases from incoming emails

Post-upgrade tasks for Supplier Case Management

After you upgrade to Washington DC, you must review all the post-upgrade tasks and complete them as needed.

Related topics

- Restructured Supplier Task table
- Run fix script to update the KPI Instruction field in the Supplier Task table
- Run fix script to migrate existing data from the deprecated Action type column after upgrade
- Enable deprecated case types after upgrade

Run fix script to update the KPI weighted score field in the KPI score table

Run this fix script to update the KPI weighted score field values (from integer to decimal type) in the KPI score table (sn_kpi_score) after the March 2026 Brazil release.

Before you begin

Role required: admin

After the upgrade, the old field **Weighted score** is replaced by **KPI weighted score** field in the KPI score (sn_kpi_score) table.

With the updated decimal type **KPI weighted score** field, all performance scores are calculated in decimal up to three decimal places.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the **Backfill KPI Weighted Score** script.
3. Open the fix script record.

   Note: In the **Script** field, the batch size variable is set to 10000. If there are more than 10000 KPI records, you can do one of the following:

   - Run the fix script repeatedly until all active records are checked and copied.
   - In the **Script** field, set the batch size variable to a number equal to the number of KPI records in your instance and select **Update**.

4. Select **Run Fix Script**.

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Run fix script to update the Aggregation method field in the KPI table

Run this fix script to update the new fields added in the KPI table (sn_kpi_kpi) after the May 2025 Brazil release.

Before you begin

Role required: admin

After the upgrade, the new fields **Aggregation method**, **Collection level**, and **Current threshold value** are added in the KPI table (sn_kpi_kpi).

It is mandatory to run the script to be able to use new features for the existing KPI records. Without the aggregation method and current threshold values, the calculated KPI behavior and KPI performance calculations might get impacted.

Note:

For new KPI templates and KPIs, there's no impact even if the script is not run.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the **KPI - May 2025 data upgrade script** script.
3. Open the fix script record.

   Note: In the **Script** field, the batch size variable is set to 9500. If there are more than 9500 KPI records, you can do one of the following:

   - Run the fix script repeatedly until all active records are checked and copied.
   - In the **Script** field, set the batch size variable to a number equal to the number of KPI records in your instance and select **Update**.

4. Select **Run Fix Script**.

Run fix script to update the KPI Instruction field in the Supplier Task table

Run this fix script to update the new field **KPI Instruction** added in the Supplier Task (sn_slm_task) table in the Brazil release.

Before you begin

Role required: admin

After the upgrade, a new field **KPI Instruction** is added in the Supplier Task (sn_slm_task) table.

The new field **KPI Instruction** added in the Supplier Task (sn_slm_task) table is derived from the KPI table (sn_kpi_kpi) **Instructions** field. Run this fix script to transfer data from the dot-walked **kpi_data.kpi.instructions** field to the **KPI Instruction** field in the Supplier Task table.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the **SLO - Feb 25 data script** script.
3. Open the fix script record.

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Note: In the **Script** field, the batch size variable is set to 1000. If there are more than 1000 supplier task records, you can do one of the following:

- Run the fix script repeatedly until all active records are checked and copied.
- In the **Script** field, set the batch size variable to a number equal to the number of supplier task records in your instance and select **Update**.

4. Select **Run Fix Script**.
   The script updates the **KPI Instruction** field value for the records where all the following conditions are met:
   - The supplier task is active
   - The supplier task is created to collect KPI data
   - The **KPI Instruction** field is empty

Related topics

Run fix script to migrate existing data from the deprecated Action type column after upgrade

Run fix script to use the Supplier Manager Workspace after upgrading to the Brazil release

Restructured Supplier Task table

Run fix scripts to enable Automated KPI collection

Run the fix scripts to enable the Automated KPIs feature that automatically calculates KPI data from database tables instead of manually entering values.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for **KPI - Dec 25 records script**.
3. Open the fix script record.
4. Select **Run Fix Script**.
5. Repeat steps 2-4 to run the **KPI - Dec 25 data records script**.

Result
After running the fix script, a new field **Data collection type** is added in the KPI Template [sn_kpi_template] table.

Related topics

Run fix script to update the Aggregation method field in the KPI table

Run fix script to update the KPI Instruction field in the Supplier Task table

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

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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**.

Related topics

Run fix script to update the KPI Instruction field in the Supplier Task table

Run fix script to use the Supplier Manager Workspace after upgrading to the Brazil release

Restructured Supplier Task table

Run fix script to use the Supplier Manager Workspace after upgrading to the Brazil release

After upgrading to the Brazil release, you can see only the Source-to-Pay Workspace on the **All** navigation tab. You don't have to do anything if you choose to continue to use the Source-to-Pay Workspace.

Before you begin

Role required: admin

About this task

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 Brazil 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.

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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**.

Related topics

- Run fix script to migrate existing data from the deprecated Action type column after upgrade
- Run fix script to update the KPI Instruction field in the Supplier Task table
- Restructured Supplier Task table

Enable deprecated case types after upgrade

After you upgrade to Brazil, you can enable deprecated case types if you have the admin role.

Before you begin

Role required: admin

About this task

In the brazil 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**.

Result

The deprecated case types now appear in the **Case type** field on the **Create New Supplier Case** form.

Related topics

- Restructured Supplier Task table
- Processing the skipped supplier catalog item records after upgrade

Processing the skipped supplier catalog item records after upgrade

After you upgrade to Brazil, the latest supplier catalog items may get skipped and therefore may not be available after the upgrade.

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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.

Related topics

Enable deprecated case types after upgrade

Restructured Supplier Task table

Install Supplier Collaboration Portal

Install Supplier Collaboration Portal application from ServiceNow Store to enable supplier self-service access to related ServiceNow® Store applications and plugins

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Supplier Collaboration Portal application (com.snc.sn_supplier_sp) installs the following dependent plugins.
  - Supplier Common Architecture (sn_slm)
  - Service Portal (com.glide.service-portal)
  - E-signature (com.snc.esign)
  - Employee Center (sn_ex_sp)

Note: You can activate additional plugins to enable other features in Supplier Collaboration Portal. For more information, see Additional plugins for Supplier Collaboration Portal.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Supplier Collaboration Portal application (com.snc.sn_supplier_sp) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result
After installing the Supplier Collaboration Portal, install the post-install fix script. For more information, see Run the fix script to enable access to Supplier Collaboration Portal.

What to do next
Ensure that you complete the post installation mandatory steps. For more information, see Post installation troubleshooting.

Related topics
- Enable access to Supplier Collaboration Portal
- Post installation mandatory step for Supplier Collaboration Portal
- Configure self-registration for external users
- Additional plugins for Supplier Collaboration Portal

Post installation mandatory step for Supplier Collaboration Portal

After you install the Supplier Collaboration Portal, ensure that you enable access to Supplier Collaboration Portal.

Related topics
- Run the fix script to 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:

Actions performed in the Supplier Collaboration Portal

Option	Instruction
Configure the user criteria for the Service Portal.	Complete these steps: 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.

Result
The access is granted and the suppliers can now self-register.

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Related topics

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 Add Supplier Roles script record to open it.
6. Select **Run Fix Script**.

Result

After the fix script run is successful, you can access the Supplier Collaboration Portal.

Related topics

Enable access to Supplier Collaboration Portal

Configure self-registration for external users

Configure self-registration for external users.

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**.

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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.
16. In **Registration form field configuration** section, in the **Account signup** form, add the form fields **Supplier name** (u_supplier_name) and **Relationship contact email** (u_relationship_contact_email).
    Then select the preview this record icon to open the record.

    Note:

    - The **Supplier name** field has been added in the Xanadu December 2024 upgrade. To enable and register this field, customize the registration form by adding the new supplier field with field label: *`Supplier name`* and column name: *`u_supplier_name`*. For more information, see Configure a user registration configuration for external users.
    - If you need to add a supplier contact whose email domain differs from the supplier's domain, you must also Enable M2M mapping between supplier contact and suppliers.

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.

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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.

```
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);
        }
        if (getParameterValue("supplier_name") &&
 (getParameterValue("supplier_name") != "null")) {
            g_form.setValue("u_supplier_name",
 getParameterValue("supplier_name"));
            g_form.setReadOnly("u_supplier_name", true);
            g_form.setValue("supplier_name",
 getParameterValue("supplier_name"));
            g_form.setReadOnly("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);
            g_form.setValue("relationship_contact_email",
 getParameterValue("relationship_contact_email"));
            g_form.setReadOnly("relationship_contact_email",
 true);

        }
    }
```

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```
}
```

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.

Related topics

Configure the flow to create approval records for all supplier contact invite requests

Enable notifications about self-registration errors

Map the self-registration configuration to Supplier Collaboration Portal

Configure system property to send registration emails to external users

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

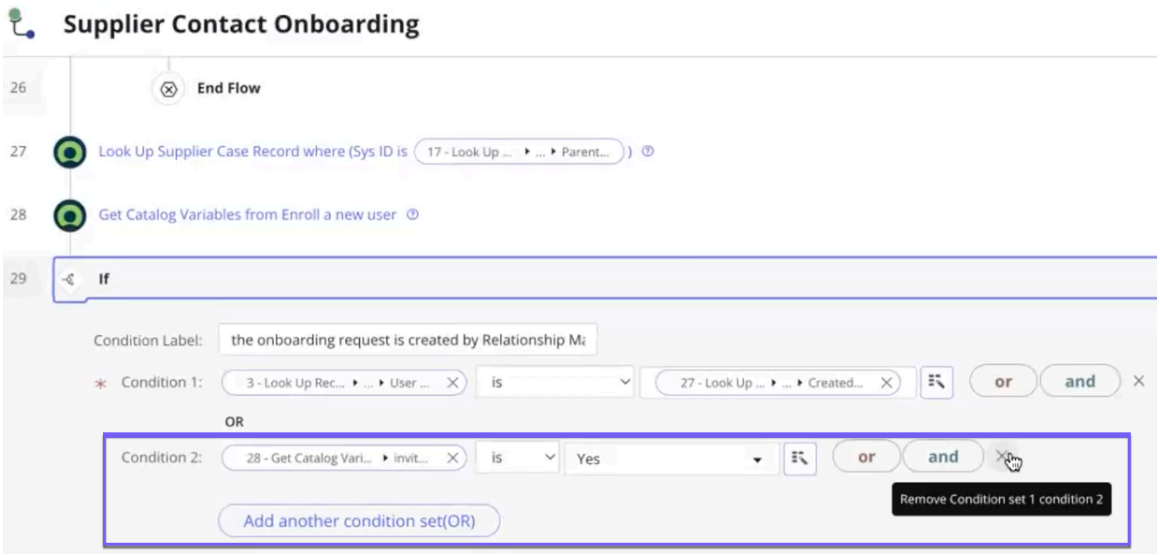
After you perform this task, an approval record is created for the Enroll a new supplier user case type, regardless of whether a supplier contact self-registers or a supplier manager invites a new supplier contact.

Important: Supplier Case Management 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.

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5. Select **Save**.

Related topics

- Map the self-registration configuration to Supplier Collaboration Portal
- Configure system property to send registration emails to external users
- Configure the Vendor Contact table to send invitation emails during self-registration

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 Case Management.
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.

Related topics

- Configure system property to send registration emails to external users
- Configure the Vendor Contact table to send invitation emails during self-registration
- Enable notifications about self-registration errors

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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 Case Management 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.

Related topics

Configure the Vendor Contact table to send invitation emails during self-registration

Enable notifications about self-registration errors

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

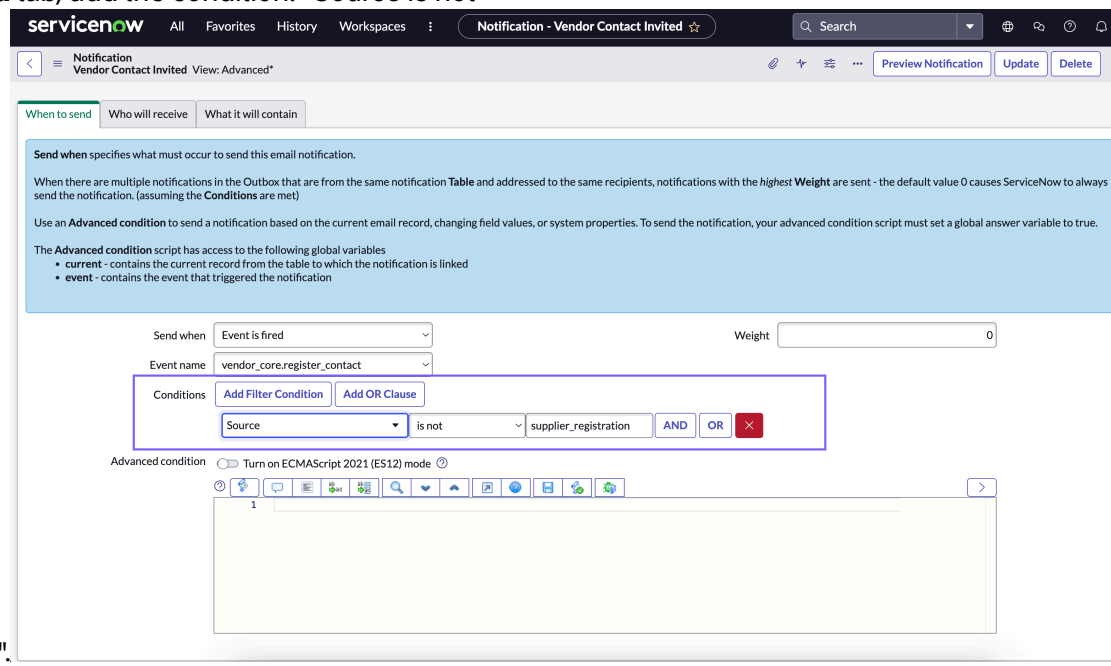
Role required: admin

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**.

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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**.

Related topics

Configure system property to send registration emails to external users

Enable notifications about self-registration errors

Enable notifications about self-registration errors

Add the sn_slm.admin role to the groups to enable supplier admins to receive an email if a supplier contact encounters an error during self-registration.

Before you begin

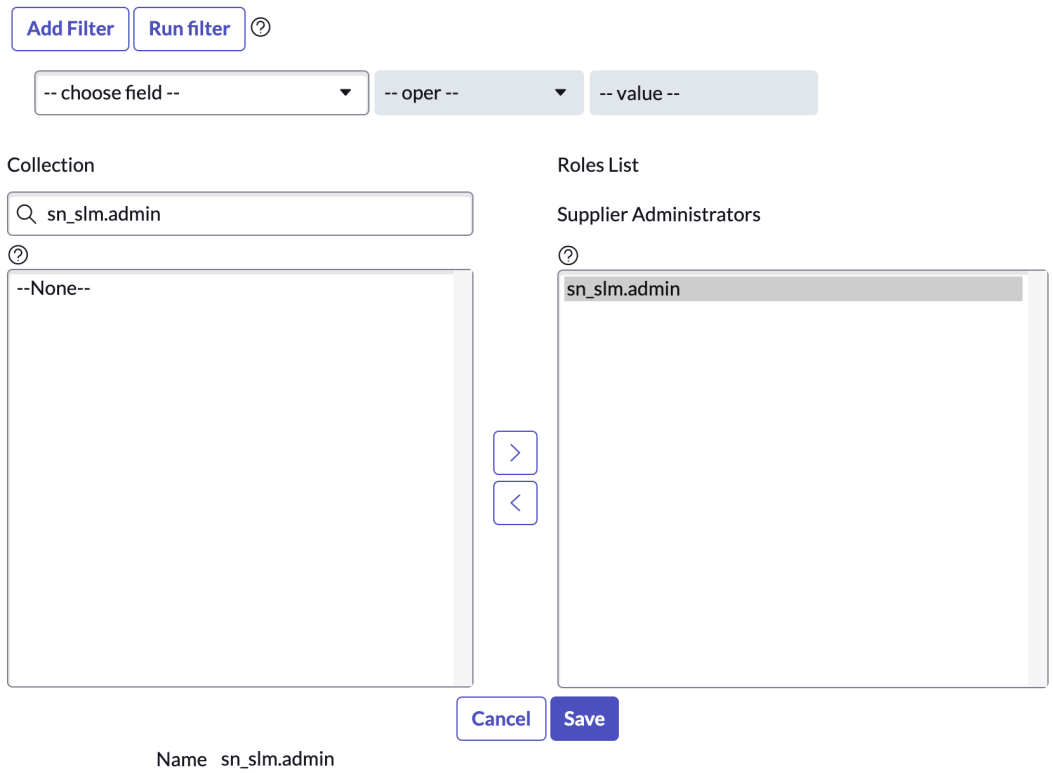
Role required: sn_slm.admin

Procedure

1. Navigate to **All** > **System Security** > **Users and Groups** > **Groups**.
2. Search for and select the **Supplier Administrators** group.
3. On the **Roles** tab, select **Edit**.

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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**.

Related topics

- Configure system property to send registration emails to external users
- Configure the Vendor Contact table to send invitation emails during self-registration

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.

Related topics

- Approve restricted caller access privileges manually
- Run the fix script for RCA approvals

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

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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**.

Related topics
Run the fix script for RCA approvals

Run the fix script for RCA approvals
After you install the Supplier Collaboration Portal application from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request.

Before you begin
Role required: admin

About this task
The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming.

To automate the RCA approvals for any record, you can run the **SCP_BULK_RCAs_Approval.xml** script where the source scope is Supplier Collaboration Portal.

Download the **SCP_BULK_RCAs_Approval.xml** file from the ServiceNow 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.

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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.

Related topics

Approve restricted caller access privileges manually

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: sn_slm.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 Case Management.

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**.

Related topics

Enable automatic creation of supplier cases from incoming emails

Email format for contacts linked with multiple suppliers

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.

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Related topics

Install Supplier Collaboration Portal

Install Supplier Operations

You can install the Supplier Operations application (com.snc.sn_so) to access advanced case management capabilities to handle key supplier lifecycle events.

Before you begin

Important: Check your entitlements to determine whether you have access to Supplier Operations.

Role required: admin

To install Supplier Operations, the following plugins have to be installed:

- **Required plugin**: Supplier Operations (com.snc.sn_so)
- **Dependent plugins**:
  - Supplier Case Management (com.snc.sn_supplier_mgmt)
  - Document Management (com.snc.platform_document_management)

Note: The application installs required ServiceNow® Store applications and plugins if they are not already installed.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Supplier Operations application (com.snc.sn_so) 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.
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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

Install Supplier Case Management

Install Supplier Payment Optimization

You can install the Supplier Payment Optimization application to identify, prioritize, and track high potential suppliers and estimate potential savings from credit card payments.

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Before you begin

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

Role required: admin

To install Supplier Payment Optimization, the following plugins have to be installed:

- **Required plugin**: Supplier Payment Optimization (com.snc.sn_slm_opt)
- **Dependent plugins**:
  - Supplier Operations (com.snc.sn_so)
  - Source-to-Pay Workspace (com.sn_spend_workspace)
  - Source-to-Pay Common Architecture (com.snc.sn_shop)

Note: The application installs required ServiceNow® Store applications and plugins if they are not already installed.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Supplier Payment Optimization application (com.snc.sn_slm_opt) 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.
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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

Install Supplier Case 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.

Important: Check your entitlements to determine whether you have access to Document Management.

Supplier Lifecycle Operations extends the Document Management plugin (com.snc.platform_document_management), which is installed along with the Supplier Operations (com.snc.sn_so) application. For more information, see Document Management.

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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.

Related topics

- Create a supplier document configuration
- Manually run a supplier document configuration
- Uploading supplier documents

Create a supplier document configuration

Create document configurations to define upload schedules, viewer access, and notification settings for documents.

https://player.vimeo.com/video/1143976653?h=412c7475d9&badge=0&autopause=0&

Before you begin

Role required: sn_slm.manager or sn_slm.admin

Procedure

1. Do one of the following.

To	Do This
Create a document configuration from the Platform UI	Navigate to **All** > **Supplier Lifecycle Operations** > **Administration** > **Document Configuration**
Create a document configuration from the Source-to-Pay Workspace	**a.** Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**. **b.** Select the list icon ( ) and navigate to **Lists** > **Administration** > **Document Configuration**.

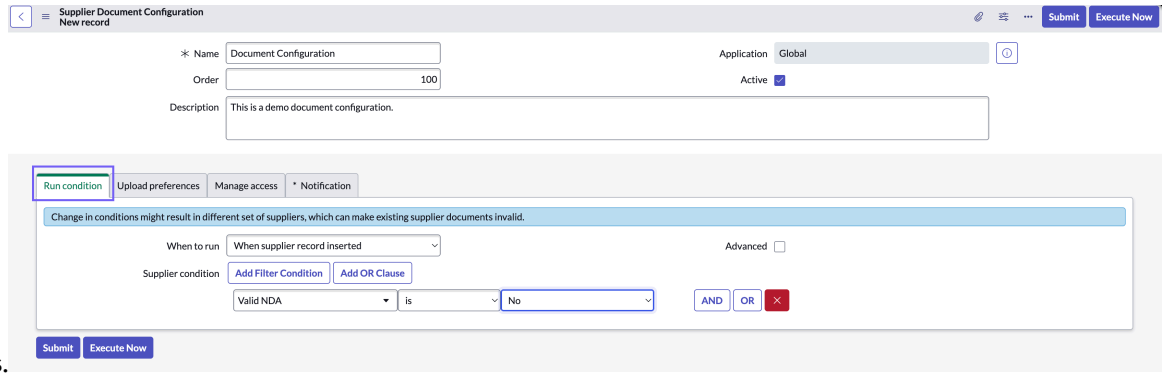
2. Select **New**.
3. On the form, fill in the fields.

Supplier Document Configuration form

Field	Description
Name	The name you assign to the configuration.
Application	The application containing this record. In this case, it displays the default application, which is Supplier Collaboration Portal.
Order	The order in which you want this configuration to be displayed in the list of orders. 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.

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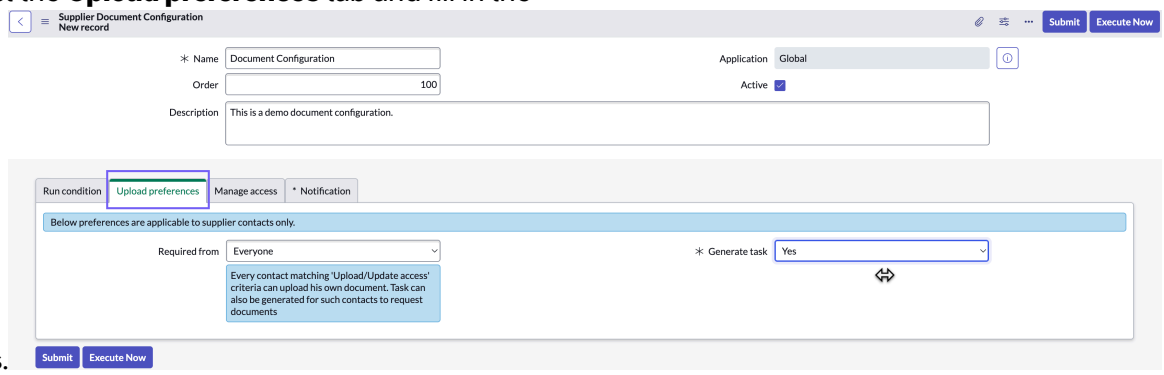
4. Select the **Run condition** tab and fill in the fields.



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.



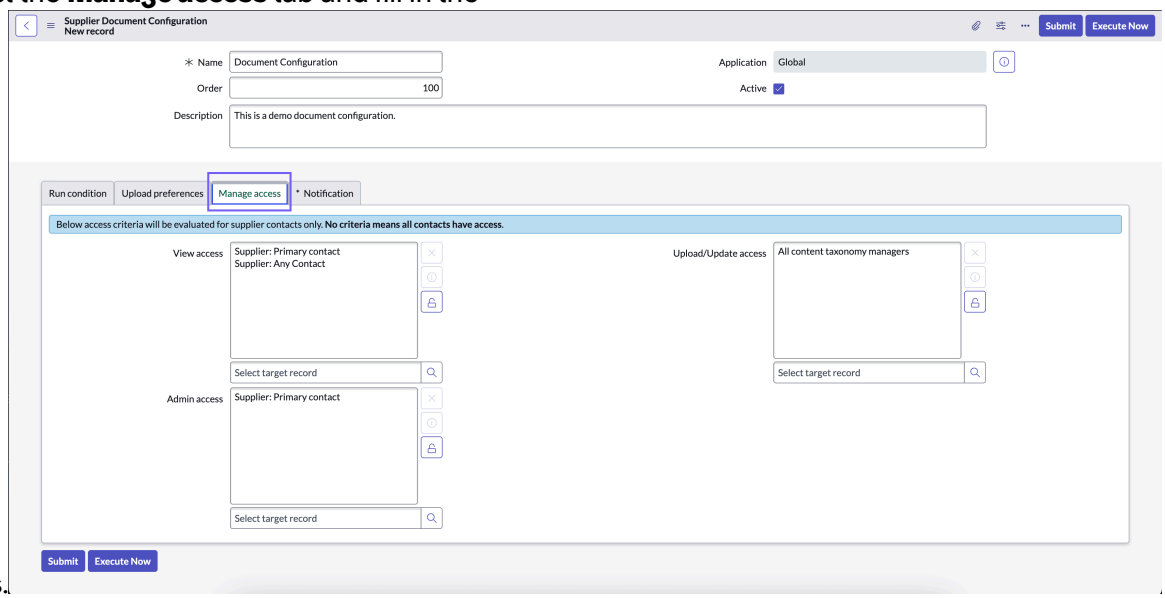
Upload preferences form

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.



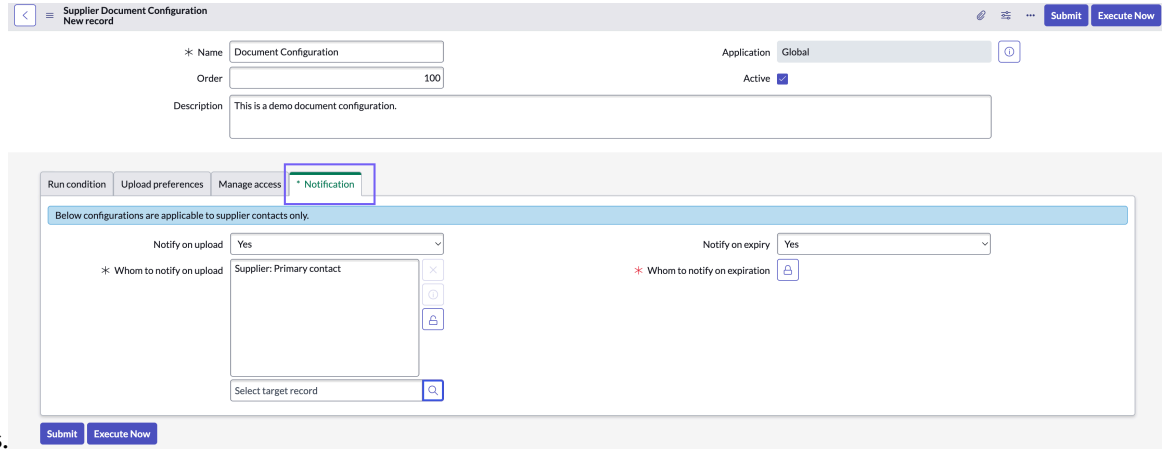
Manage access form

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.

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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. Search for the users using the search icon in the **Select target record** field.
Notify on expiry	Controls whether a notification is sent when a document expires. The options are: ○ **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. Search for the users using the search icon in the **Select target record** 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**.

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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 in which you want the configuration to be displayed in the list of orders. Assign a numeric value in multiples of 100.
Days to expiry	Number of days before the document expires. **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.

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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**.

Related topics

Manually run a supplier document configuration

Uploading supplier documents

Manually run a supplier document configuration

Run a supplier document configuration to enable supplier managers, supplier owners, and supplier contacts to immediately upload the required documents.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.contact or sn_slm.admin

About this task

The supplier document configuration is configured to run based on the run conditions that you set. However, you can run them manually when needed. Running the document configuration creates either or both of the following in the Supplier Collaboration Portal, based on the run conditions:

- A tile in the Documents widget on the My Company page. The supplier contact can upload a document using this tile in the Documents widget.

  Note: The Documents widget is created if you select **Anyone** from the **Required from** field in the Upload preferences form. The tile in the Documents widget is named after the supplier document type name that you provided when creating the supplier document configuration.

- The Upload Document task on the My To-dos page. The supplier contact can upload a document using this task. The Upload Document task is created if you select **Everyone** from the **Required from** field and also set the **Generate task for** field to **Yes** in the Upload preferences form.

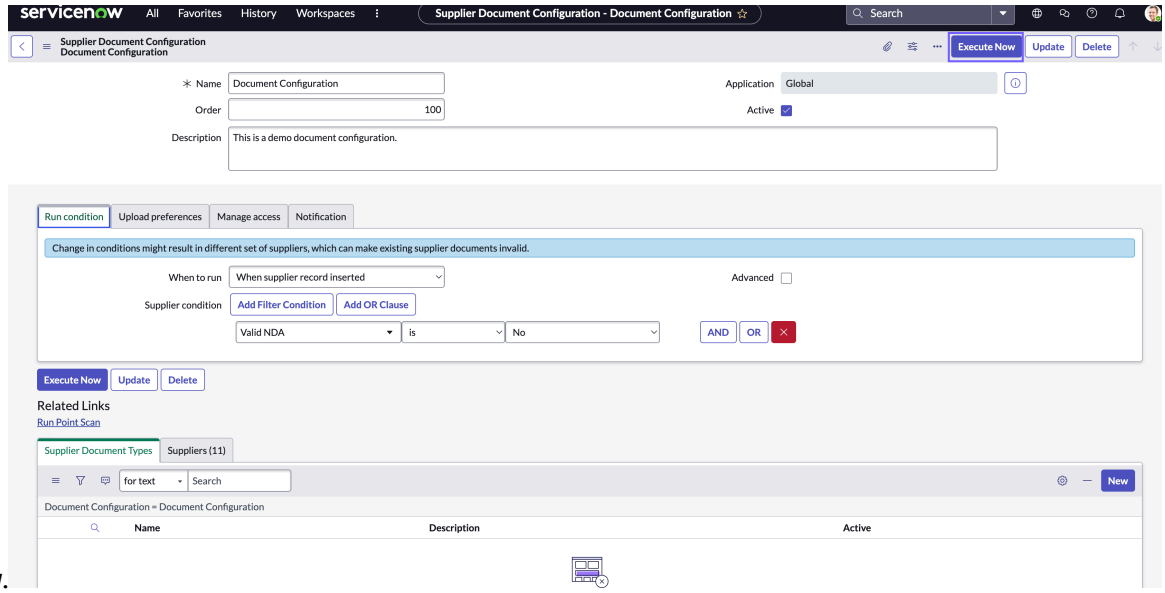
Procedure

1. Do one of the following.

To	Do This
Run a document configuration from the Platform UI	Navigate to **All** > **Supplier Lifecycle Operations** > **Administration** > **Document Configuration**
Run a document configuration from the Source-to-Pay Workspace	**a.** Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**. **b.** Select the list icon () and navigate to **Lists** > **Administration** > **Document Configuration**.

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2. Select the document configuration that you want to run.
3. Select **Execute Now**.



Related topics

Create a supplier document configuration

Uploading supplier documents

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.

Related topics

Create a supplier document configuration

Manually run a supplier document configuration

Configure document expiration monitoring attributes

Configure document attributes such as grace period, lead time, and reminder frequency to manage document that are near or past their original expiry date.

Before you begin

Role required: sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Administration** > **Supplier document expiration monitoring attributes**.
   The Decision Builder opens and displays the Decision table to configure the grace period, lead time, and reminder frequency.

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Supplier document expiration monitoring attributes decision table

Attribute	Description
Grace period	Additional time allotted to complete the document upload task after the initial due date is past. The default duration for this attribute is 30 days. **Note:** A supplier case is created once the grace period elapses. For more information, see Case playbook for specific supplier case types.
Reminder frequency	The frequency at which email reminders are sent within the grace period for completing the document task. The default reminder frequency is set to 7 days.
Lead time	The number of days before the document expiry date when a document upload task is created. The default time is 30 days. **Note:** A supplier task is created once the configured lead time elapses.

2. In the decision table, go to the document attribute that you want to configure and set the time period in terms of days.
3. Select **Save**.

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: sn_slm.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:

Actions performed in document template

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**.

Related topics

Approve application restricted caller access privileges for Sign document supplier task type

Supplier Document Management

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:

Filter criteria for RCA record

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**.

Related topics

Configure the document template for the Sign document action type for supplier task

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.

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Important: Check your entitlements to determine whether you have access to Advanced Work Assignment for Supplier Lifecycle Operations.

Advanced Work Assignment for Supplier Lifecycle Operations pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. For more information, see Exploring Advanced Work Assignment.

Prerequisites for installing Advanced Work Assignment for Supplier Lifecycle Operations

Before you install Advanced Work Assignment for Supplier Lifecycle Operations, ensure that you activate the Agent Chat application and load the demo data during installation. For more information, see Activate Agent Chat and load demo data.

Required plugins

Install the Advanced Work Assignment for Supplier Lifecycle Operations (com.snc.sn_slm_awa) plugin if you have the admin role. Installing this plugin also installs the following dependent plugins:

- Advanced Work Assignment (com.glide.awa)
- Agent Chat (com.glide.interaction.awa)
- Glide Virtual Agent (com.glide.cs.chatbot)
- Supplier Case Management (com.snc.sn_supplier_mgmt)

Related topics

Setting up Advanced Work Assignment for Supplier Lifecycle Operations

Using Advanced Work Assignment for Supplier Lifecycle Operations

Source-to-Pay Workspace agent inbox

Configure the Supplier Collaboration Queue

Configure Agent Chat for Source-to-Pay Workspace

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.

Related topics

Activate Agent Chat and load demo data

Activate Agent Chat and load demo data

Activate Agent Chat and load demo data.

Before you begin
Role required: admin

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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**.

Related topics

Source-to-Pay Workspace agent inbox

Setting up Advanced Work Assignment for Supplier Lifecycle Operations

Plan and configure your implementation of Advanced Work Assignment for Supplier Lifecycle Operations.

Setting up Advanced Work Assignment for Supplier Lifecycle Operations involves configuring the following components:

- Service channels: A means of providing customer service. Advanced Work Assignment offers base system channels for chats, cases, incidents, and walk-up centers. For each channel, you can set attributes such as agent capacity and utilization conditions to control the work handled in the channel.
- Work item: A single piece of work handled by an agent from start to completion.
- Work item queue: A queue that stores a specific type of work item for a service channel.
- Assignment groups: Agents belong to specific groups organized by the type of work assigned to them.
- Assignment rules: Criteria that determine how work items are pushed to the appropriate agent within a qualified assignment group.
- Agent capacity: The maximum number of work items on a particular service channel that an agent may actively work on at one time. If you want to set a maximum capacity for an agent across all service channels, define the maximum universal capacity for that agent.
- Agent availability: States that indicate agent presence and whether the agent is available for work or is busy or offline. Advanced Work Assignment uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in the Source-to-Pay Workspace.

For more information, see Exploring Advanced Work Assignment.

Related topics

Configure Advanced Work Assignment for Supplier Lifecycle Operations

Configure the Supplier Collaboration Queue

Configure Agent Chat for Source-to-Pay Workspace

Using Advanced Work Assignment for Supplier Lifecycle Operations

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.

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Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment**.
2. Create a service channel to automatically route incoming work to agents.

   For more information, see Create or configure a service channel.

   The following service channels are specific to Advanced Work Assignment for Supplier Lifecycle Operations.

   - Supplier Cases
   - Chat

   After you have created a service channel, do the following:

   a. Configure the agent capacity to determine the number of work items that can be automatically assigned to agents supporting a service channel. For more information, see Override agent capacity for selected agents.

   b. Create or change an inbox layout to determine the information shown on work item cards displayed in an agent's inbox. For more information, see Create or change an inbox layout.

   c. Create a work item size override if you want to calculate an agent's workload using a work item size other than the default. For more information, see Create or change a work item size override.

3. Define or change a queue so that you can determine which work items are routed automatically to agents through a given service channel.
   For more information, see Create a work item queue.
4. Set the Advanced Work Assignment criteria for assigning work items to agents.
   For more information, see Configure agent assignment rules.
5. **Optional:** Configure the following parameters to improve your Advanced Work Assignment functionality:

   a. Create or modify the availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. For more information, see Configure agent presence states.

   b. Define the reasons that agents can use to decline work assignments that they receive in their Agent Workspace inbox. For more information, see Configure reasons for rejecting work items.

   c. Prevent an agent from being assigned too many work items by configuring the agent's maximum universal capacity. For more information, see Configure an agent's maximum universal capacity.

   d. Create or manage groups that have associated Advanced Work Assignment queues. For more information, see Create or change groups for Advanced Work Assignment queues.

   For detailed instructions on how to configure Advanced Work Assignment, see Configuring Advanced Work Assignment.

Result

The AWA routing is active and can be tested via `configure-scp-queue.dita`.

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Related topics

Configure the Supplier Collaboration Queue

Configure Agent Chat for Source-to-Pay Workspace

Configure the Supplier Collaboration Queue

Configure the Supplier Collaboration Queue to route and assign supplier portal chat requests in a defined group via AWA.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Queues**.
2. Select **Supplier Collaboration Queue**.

   For more information about the fields on the Supplier Collaboration Queue form, see Create a work item queue.
3. In the **Initial agent response** field, enter the message that you want the users to see when an agent accepts a chat.
   For example: `Thank you for contacting support. I am looking into your question now and will be with you shortly.`
4. In the **Max wait time message** field, enter the message that you want the users to see when a chat ends after the Max Wait Time has elapsed.
   This field is required if the **Max Wait Time** is greater than 0.
5. In the **Target wait time** field, enter the estimated time (Days or Hours, minutes, seconds) you want allotted for an agent to accept an item in the queue.
6. In the Max Wait Time field, enter the maximum amount of time within which all available agents have to accept or reject a chat request.
   After time runs out, the requester receives the value in either the **Max wait time message** field or the **No Agents Available Message** field defined in Agent Chat settings.

   Note: The **Max Wait Time** field is available after you associate the queue to the chat service channel.
7. In the Assignment Eligibility related list, select **New**.
   a. In the **Agent assignment rule** field, select **Chat - Most Capacity**.
   b. Click the lock icon ( ) next to the **Groups** field.
   c. Click the look-up icon ( ) to view the list of groups.
   d. Select **New**.
   e. In the **Name** field, enter a name for the group.
   f. Fill in the remaining fields, as appropriate.
   g. Select **Submit**.
   h. Click the lock icon ( ) to lock the **Groups** field.
   i. Right-click and select **Save**.
8. Next to the **Groups** field, select the link to the group, which opens the group record.

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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.

Result
The queue is activated and the chat routing is applied.

Related topics

Configure Agent Chat for Source-to-Pay Workspace

Configure Advanced Work Assignment for Supplier Lifecycle Operations

Configure Agent Chat for Source-to-Pay Workspace

Use Agent Chat Settings to configure Agent Chat for Source-to-Pay Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Settings** > **Agent Chat**.
2. In the User Experience - Chat settings section, do the following:
   a. Swipe the **Agent names and avatars** toggle switch to the right to enable this option.
   b. Swipe the **Transcripts** toggle switch to the right to enable the requesters to download a transcript of the conversation they had with an agent. For more information, see Chat transcript downloads for requesters.
3. In the User Experience - Statuses section, from the Live chat wait status drop-down list, select **Wait Time**.
4. In the Configurable Toolbar Controls section, select **View All**.
   The Quick Action Toolbar Controls is displayed.

   Add or update the quick action shortcuts for live agents in the Agent Chat. For more information about configuring the toolbar controls, see Setting up quick action toolbar controls.
5. Select **Save**.

Result
After Agent Chat for Source-to-Pay Workspace is configured, chat routing is not active until AWA is also configured.

Related topics

Configure Advanced Work Assignment for Supplier Lifecycle Operations

Configure the Supplier Collaboration Queue

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.

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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.

Related topics

Configure Advanced Work Assignment for Supplier Lifecycle Operations

Setting up Advanced Work Assignment for Supplier Lifecycle Operations

Enable M2M mapping between supplier contact and suppliers

Enable many-to-many (M2M) mapping between supplier contacts and suppliers. This 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 to enable M2M mapping.
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).

Related topics

Run the fix script to enable M2M mapping

Verify version record

Remove the unique constraint from Email Domain

Run the fix script to enable M2M mapping

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. For more information, see Application picker.

Role required: admin

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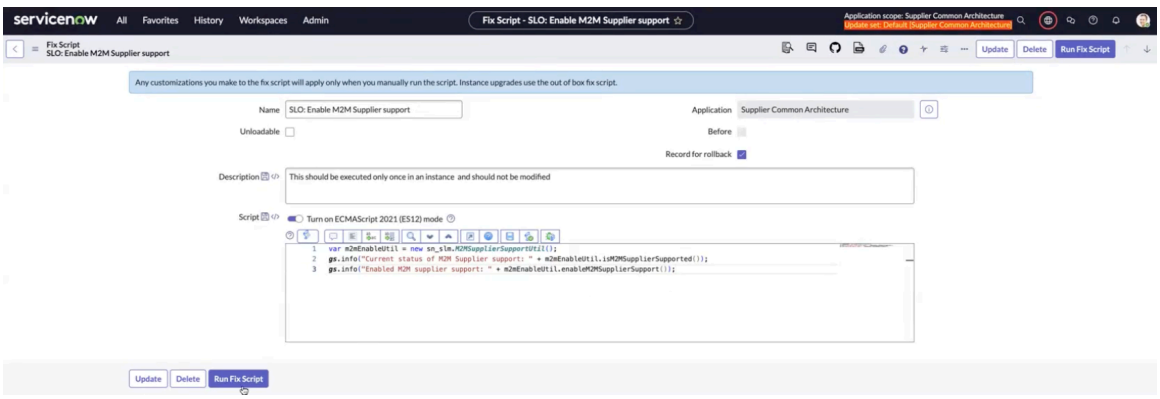
Procedure

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`.

Related topics

Verify version record

Remove the unique constraint from Email Domain

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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.

Before you begin

Verify that the application scope is set to Supplier Common Architecture by selecting the globe icon from the upper-right pane.

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.

Related topics

Run the fix script to enable M2M mapping

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 on the header.
3. Select **ConfigureTable**.
4. Select **Email Domain** from the **Columns tab** to open the Dictionary Entry of `sn_slm_email_domain` table.
5. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
6. From the **Available** list of fields, select the **Unique** field and move it to the **Selected** column.
7. Select **Save**.
   The **Unique** field is now available in the Dictionary of the `sn_slm_email_domain` table.
8. 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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Related topics

Run the fix script to enable M2M mapping

Verify version record

Configure Supplier Relationship and Performance Management

Define key performance indicators (KPIs) and segmentation criteria to measure supplier performance effectively.

Important: Check your entitlements to determine whether you have access to Supplier Relationship and Performance Management.

Configuring Supplier Relationship and Performance Management (SRPM) involves the following:

- **Create KPI template and its thresholds**: Define KPI template and thresholds to collect the metrics systematically by creating data collection tasks for evaluating supplier performance.
- **Create automated KPI template and KPIs**: Define automated KPI template and KPIs to collect the metrics automatically from the specified data source and calculation method.
- **Create supplier-level KPIs**: Add suppliers to a KPI template or vice versa to generate corresponding supplier-level KPI records and KPI collection tasks for the suppliers.
- **Create contract-level KPIs**: Add KPI template to a supplier to generate corresponding contract-level 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.

Related topics

Create KPI units

Create KPI performance domains

Create manual KPI templates

Create KPI units

Create KPI units to be used as measurement units for the quantitative performance of the supplier KPIs.

https://player.vimeo.com/video/1191676705?h=068197d591&badge=0&autopause=0&player_id=0&%E2%80%A6

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

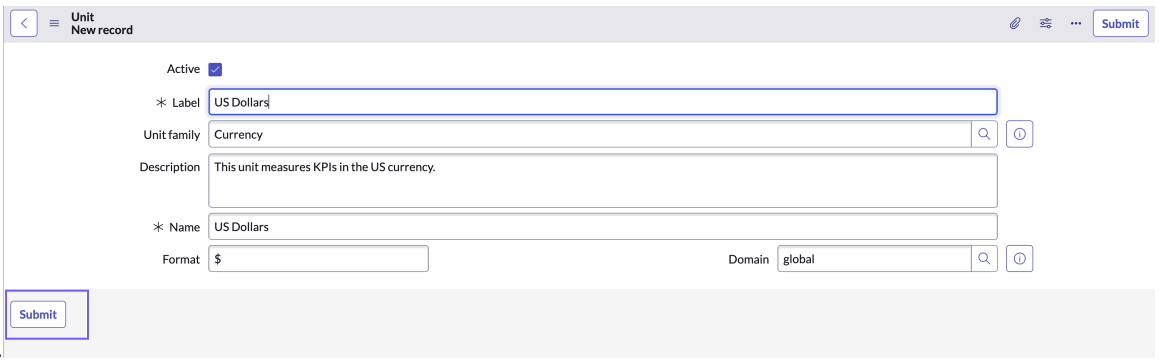
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. In the navigation filter, enter `sn_kpi_unit.LIST`.
   The list of existing units are displayed.
3. Select **New**.
4. On the form, fill in the fields.

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Create 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.
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.
A record is created for the new KPI unit.

Related topics

Create KPI performance domains

Create manual KPI templates

Create KPIs by adding suppliers to a KPI template

Create KPI performance domains

Create KPI performance domains to categorize KPIs into groups visible in the supplier KPI management tab and the Performance dashboard.

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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**.
   A record is created for the new performance domain.

Related topics

Create KPI units

Create manual KPI templates

Create KPIs by adding suppliers to a KPI template

KPI templates

KPI templates are created to define KPIs that can be used to measure supplier performance.

You can define KPI templates and thresholds to collect the metrics systematically for evaluating supplier performance. KPI templates can be of the following types:

- **Manual KPI templates**: KPIs created from the manual KPI templates requires users (internal or external) to manually input KPI data based on the frequency schedules. This option is available both for quantitative and qualitative KPIs. For more information, see Create manual KPI templates.
- **Automated KPI templates**: KPIs created from the automated KPI templates extract and calculate data directly from the specified table using a specified method (count, sum, average, max, min, or latest value) based on the frequency schedules. This option is only available for quantitative KPIs. For more information, see Create automated KPI templates.

  Note:

  To enable the Automated KPIs feature after an upgrade, run the fix scripts **KPI - Dec 25 records script** and **KPI - Dec 25 data records script**. For more information, see Run fix scripts to enable Automated KPI collection.

- **Integration KPI templates**: KPIs created from integration KPI templates retrieve data automatically from external sources such as FedEx DataWorks. The external source is specified

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in the *External source* field, which references the ERP source table. This option is only available for quantitative KPIs. For more information about FedEx DataWorks integration, see FedEx Dataworks Integration for Supplier Lifecycle Operations.

Create manual KPI templates

Create manual KPI templates to define KPIs that require users to manually input KPI data based on the frequency schedules.

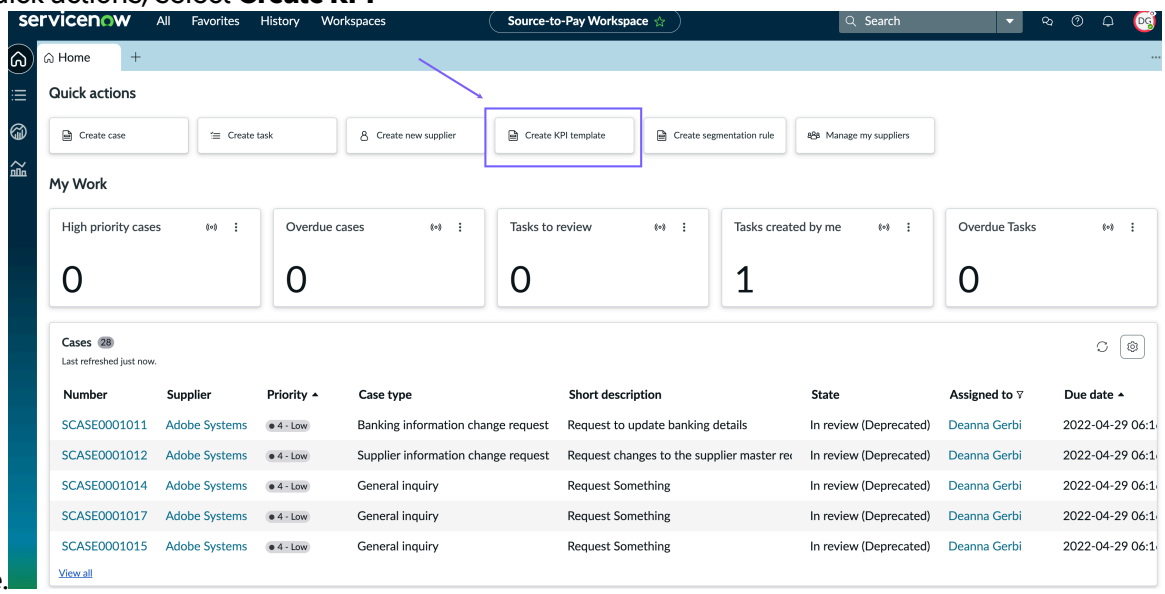
Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Manual KPI templates can be created for both **Qualitative** and **Quantitative** KPI types.

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**.
3. On the form, fill in the fields.

   Select **Manual** for creating a manual KPI template.

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:

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Field	Description
	○ Quantitative ○ Qualitative **Note:** Manual KPI templates can be created for both **Qualitative** and **Quantitative** KPI types.
Active	This option is turned off by default. The KPI is automatically set to active after you have added at least two thresholds for the KPI and one of those thresholds is marked as target.
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	
Data collection type	Select **Manual** for creating a manual KPI template. **Note:** For **Qualitative** KPI type, only manual KPI template can be created.
Collection source	The user persona that provides the data. The available options are: ○ User ○ Supplier Manager ○ Supplier Contact

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Field	Description
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
Contract data aggregation method	The method used to calculate the aggregated KPI value when the given KPI consists of contract-level sub-KPIs: ○ Average ○ Sum ○ Minimum ○ Maximum

4. Select **Save**.

Result

A KPI is created for the selected supplier. This KPI is activated only when the following conditions are met:

- At least two active thresholds are added to the KPI
- One of those thresholds is marked as target
- The template is added to a segmentation rule to produce KPIs

Related topics

KPI templates

Create KPI thresholds

Create KPI units

Create KPI performance domains

Create automated KPI templates

Create automated KPI templates to eliminate manual data input by configuring data sources and calculation methods.

Before you begin

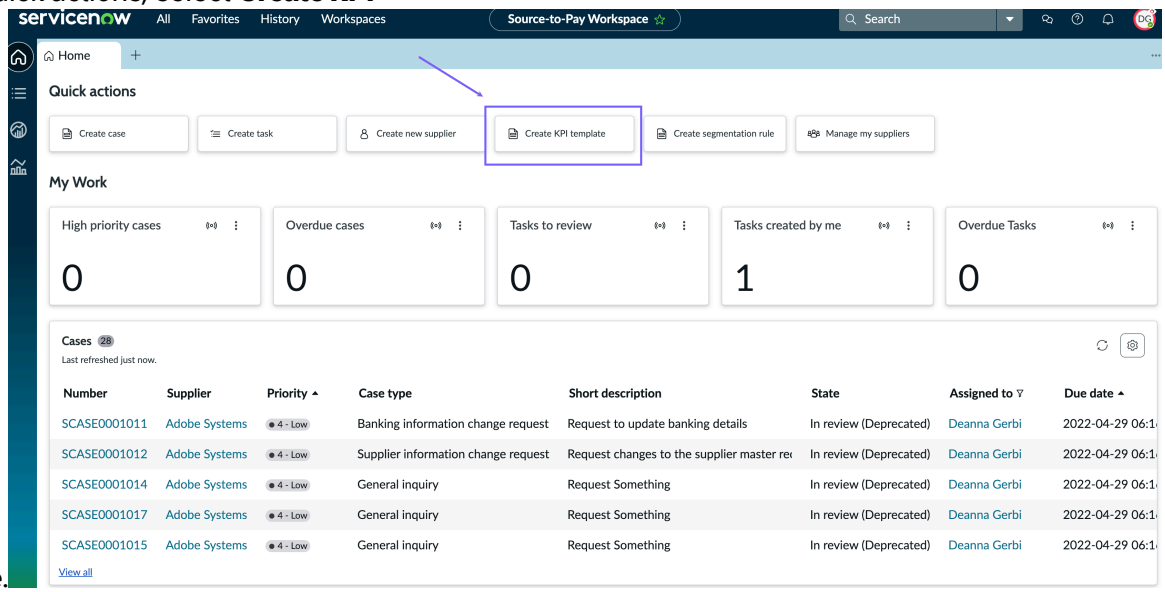
Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

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- Automated KPI templates can be created for **Quantitative** KPI template type only.
- You must have access to data tables for extracting information for automated KPI templates.
- If the automated KPI collection fails to extract data, manual KPI data collection tasks are created and assigned to the supplier manager.

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**.
3. On the form, fill in the fields.

   Select **Automated** for creating an automated KPI template.

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. Select **Quantitative**. **Note:** Automated KPI templates can be created for **Quantitative** KPI template type only.
Active	This option is turned off by default. The KPI is automatically set to active after you have added at least two thresholds for the KPI and one of those thresholds is marked as target.

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Field	Description
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	
Data collection type	Select **Automated** for creating a automated KPI template. **Note:** Automated KPI template can be created only for **Quantitative** KPI type.
Collection table	Table from where KPI data is to be collected. **Note:** You must have access to the data tables for extracting data for automated KPIs.
Entity table column	Column of the collection table which refers to the supplier or contract name.
KPI data table column	Column of the collection table which contains the KPI data to be extracted.
Automated data aggregation method	The aggregation method used to calculate the data extracted from the tables mentioned according to the condition: ○ Count ○ Sum ○ Average ○ Min

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Field	Description
	○ Max ○ Latest
Collection frequency	The frequency for collecting the KPI data. The available options are: ○ Daily ○ Weekly ○ Monthly ○ Quarterly ○ Semi-annually ○ Annually
Contract data aggregation method	The method used to calculate the aggregated KPI value when the given KPI consists of contract-level sub-KPIs: ○ Average ○ Sum ○ Minimum ○ Maximum
Criteria	Build a filter criteria by adding conditions that contain a field, operator, and value(s).
Instructions	Populated in KPI collection tasks to give more context to the user providing the KPI data.

4. Select **Save**.

Result

An automated KPI template is created. This KPI is activated only when the following conditions are met:

- At least two active thresholds are added
- One of those thresholds is marked as target

Related topics

KPI templates

Create KPI thresholds

Create KPI units

Create KPI performance domains

Create KPI thresholds

Create KPI thresholds that consist of predefined values that serve as benchmarks or limits for evaluating performance against specific objectives.

https://player.vimeo.com/video/1139080525?h=e3c24d1b91&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_slm.manager or sn_slm.admin

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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.

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 indicating that 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**.

Note: A KPI is activated only when at least two active thresholds are added to it and one of those thresholds is marked as **Target threshold**.

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Related topics

Create manual KPI templates

Create KPIs by adding suppliers to a KPI template

Add suppliers to KPI templates to generate KPI records and collection tasks automatically.

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**.
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 supplier-level KPIs from KPI management

Add supplier-level and contract-level KPIs from **KPI management** tab to measure performance metrics.

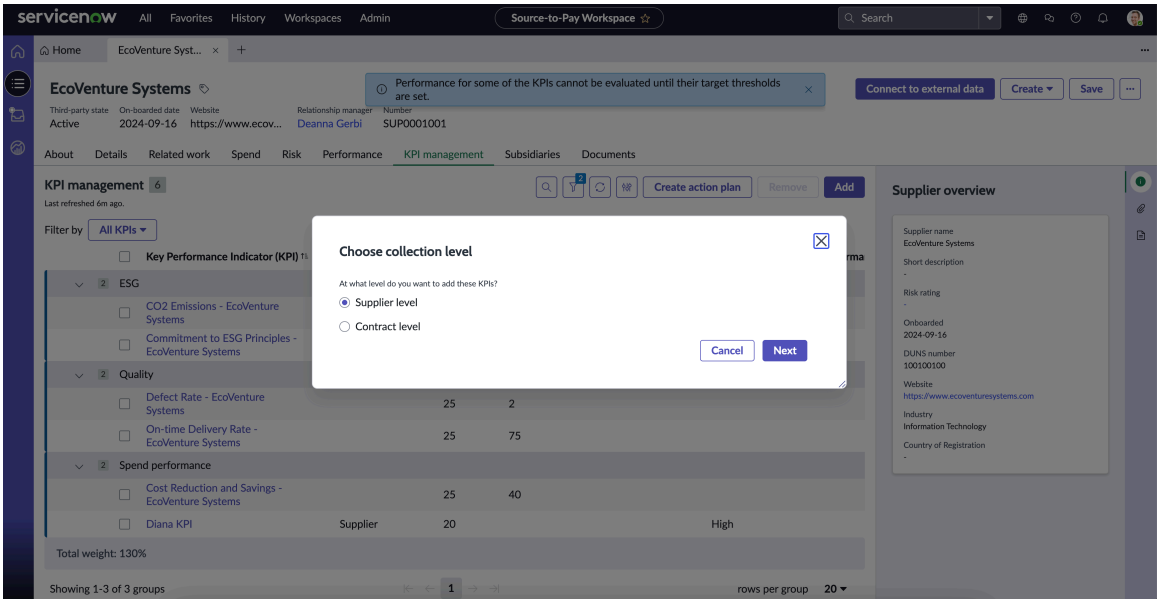
Before you begin

Role required: sn_kpi.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.
5. Select **Add**.
6. Select the collection level as **Supplier level**.

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7. Select a KPI template from the list of available KPI templates.
8. Select **Add**.

   The corresponding KPI records and KPI collection tasks are created.

Related topics

- Create contract-level KPIs from KPI management
- Create KPIs without using KPI template
- Create KPIs by adding suppliers to a KPI template

Create contract-level KPIs from KPI management

Add contract-level KPIs from supplier **KPI management** tab to measure performance at contract level.

Before you begin

Role required: sn_kpi.admin

You can add contract-level KPIs 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.

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.
5. Select **Add**.
6. Select the collection level as **Contract level**.
7. Select the applicable contracts from the list of available contracts.
8. Select a KPI template from the list of available KPI templates.
9. Select **Add**.

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The corresponding KPI records and KPI collection tasks are created.

Note:

- All contract-level KPIs are defined under their respective supplier-level KPIs. If a supplier-level KPI doesn't exist for a newly created contract-level KPI, a corresponding parent supplier-level KPI is also created.
- Aggregated values from contract-level KPIs must fall in the threshold ranges of their respective supplier-level KPIs. Therefore, supplier-level KPI thresholds must be defined for all possible aggregated values of contract-level KPIs, otherwise the KPI data won't be generated.

Related topics

Create supplier-level KPIs from KPI management

Create KPIs without using KPI template

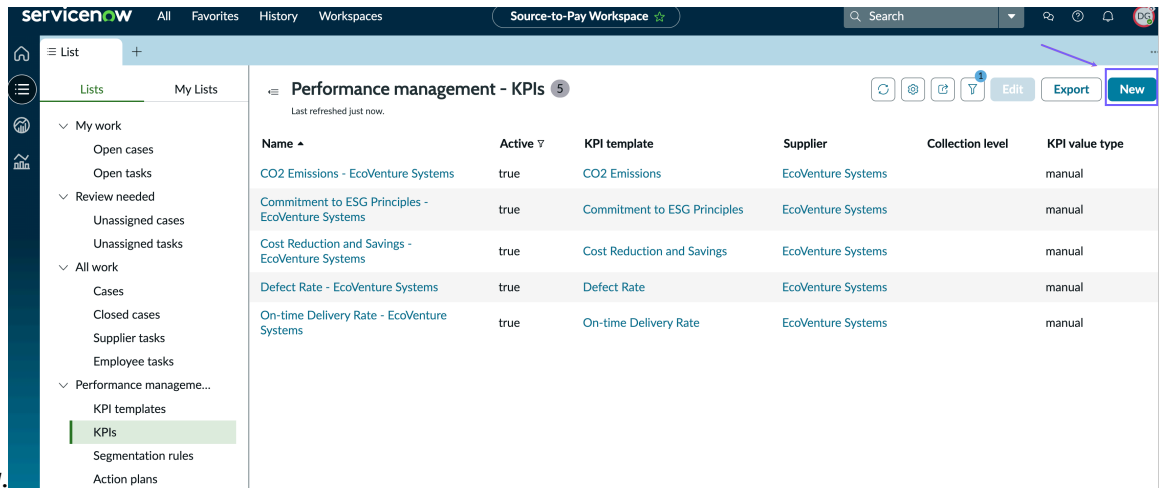
Create KPIs without using KPI template

Create KPIs for a supplier without using a templates,which automatically generates a corresponding KPI template.

Before you begin
Role required: sn_kpi.admin

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. Select **New**.



4. On the Create New KPI form, fill in the fields.

Create New KPI form

Field	Description
Basic details	
Name	Name of the KPI.
Supplier	Name of the supplier.

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Field	Description
Description	Brief description of the KPI template.
Type	Indicates the type of the KPI. The available options are: ○ Quantitative ○ Qualitative **Note:** ○ Manual KPIs can be created of both Qualitative and Quantitative types. ○ Automated KPIs can be created only of Quantitative type.
Active	This option is turned off by default. The KPI is automatically set to active after you have added at least two thresholds for the KPI and one of those thresholds is marked as target.
KPI properties	
Performance domain	Indicates the group that the KPI belongs to.
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 maximized 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	
Data collection type	Select **Manual** for creating a manual KPI template. Select **Automated** for creating a automated KPI template.

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Field	Description
Collection source (for **Manual** data collection type)	The user persona that provides the data. The available options are: ○ User ○ Supplier Manager ○ Supplier Contact
Collected from (for **Manual** data collection type)	The person who provides the data. This field is displayed only if you select **User** in the **Collection source** field.
Collection table (for **Automated** data collection type)	Table from where KPI data is to be collected. **Note:** You must have access to the data tables for extracting data for automated KPIs.
Entity table column (for **Automated** data collection type)	Column of the collection table which refers to the supplier or contract name.
KPI data table column (for **Automated** data collection type)	Column of the collection table which contains the KPI data to be extracted.
Automated data aggregation method (for **Automated** data collection type)	The method used to calculate the aggregated KPI value when the given KPI consists of automated KPIs: ○ Count ○ Sum ○ Average ○ Min ○ Max ○ Latest
Criteria (for **Automated** data collection type)	Build a filter criteria by adding conditions that contain a field, operator, and value(s).
Collection frequency	The frequency for collecting the KPI data. The available options are: ○ Daily ○ Weekly ○ Monthly ○ Quarterly ○ Semi-annually ○ Annually
Contract data aggregation method	The method used to calculate the aggregated KPI value when the given KPI consists of contract-level sub-KPIs: ○ Average ○ Sum

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Field	Description
	○ Minimum ○ Maximum
Instructions	Populated in KPI collection tasks to give more context to the user providing the KPI data.
Next run date	The next scheduled run date in yyyy-mm-dd format.

5. Select **Save**.

Result
A KPI is created for the selected supplier. Also, a corresponding KPI template is created.
This KPI is activated only when the following conditions are met:

- At least two active thresholds are added
- One of those thresholds is marked as target

Note: For Automated KPIs:

- You must have access to the data tables for extracting data for automated KPIs.
- If the automated KPI collection fails to extract data, manual KPI data collection tasks are created and assigned to the supplier manager.

Related topics

Create KPIs by adding suppliers to a KPI template

Create KPI units

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.

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Field	Description
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
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**.

Result
A new segmentation rule is created.

Related topics
Add KPI templates to a segmentation rule

Add suppliers to a segmentation rule

Add KPI templates to a segmentation rule

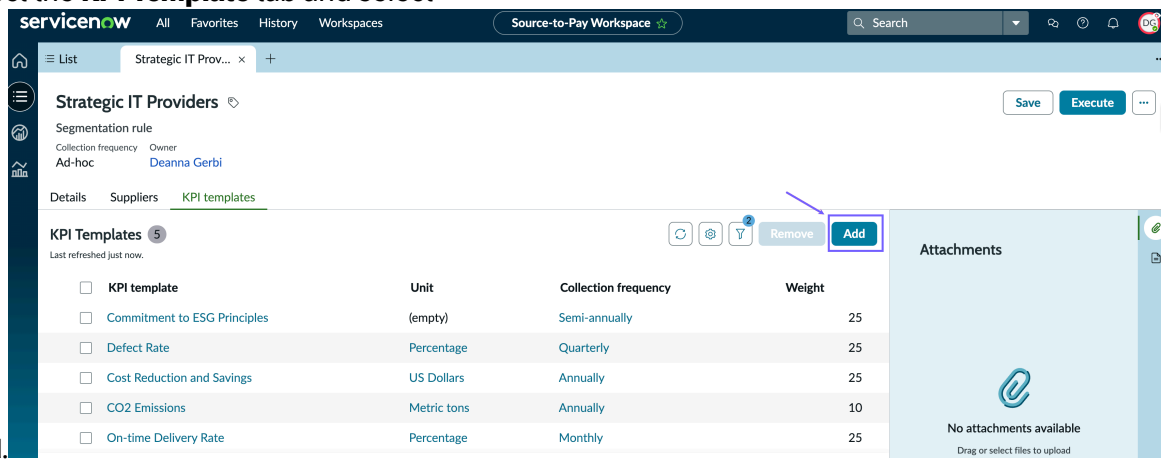
You can add new KPI templates to a segmentation rule if the existing templates used for suppliers don't meet your needs.

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.

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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.

Result

KPIs are generated on the next segmentation rule run.

Related topics

- KPI templates
- Add suppliers to a segmentation rule
- Create 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:

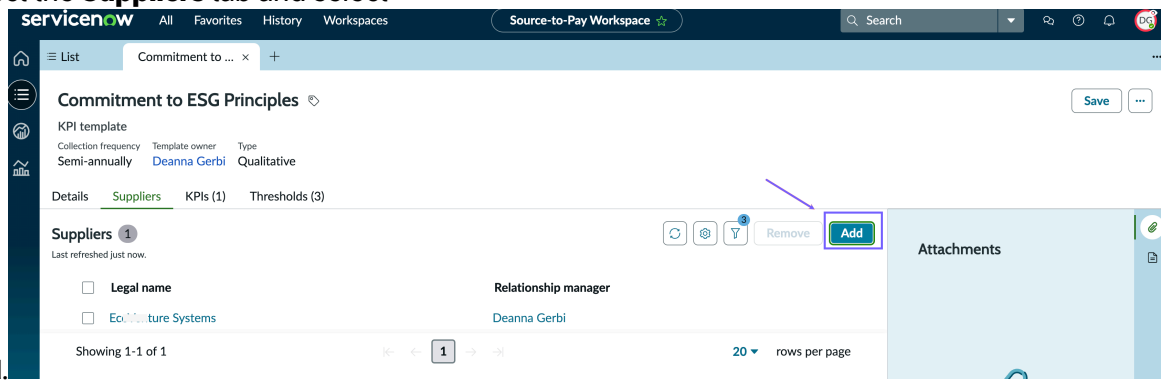
- Automatically displays suppliers that match this segmentation rule or other set condition after you run the segmentation rule by selecting **Execute**.
- Displays suppliers that you add manually by selecting **New**.

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.

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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.

Result

The KPI collection tasks will be generated for the added supplier on next run.

What to do next

Select **Execute** to run the segmentation rule. For more information, see Run segmentation rule.

Related topics

Create segmentation rule

Add KPI templates to a segmentation rule

Install Universal Request for SLO

Install the Universal Request for Source-to-Pay Operations [sn_fsc_ur_common] plugin to use the Universal Request feature in SLO.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you can't find the plugin, request it from a ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for Universal Request for Source-to-Pay Operations.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Components installed with Universal Request.

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Configure smart assessments

Supplier managers can configure and create assessments in bulk for internal and external users by adding instructions, questions, and reference information from the Assessment Workspace.

Prerequisites for creating smart assessments

To use this functionality, verify that the following plugins are installed:

- Smart Assessment Core plugin (com.sn_smart_asmt)
- Smart Assessment Designer plugin (com.sn_smart_asmt_desg)
- Smart Assessment Connected plugin (com.sn_smart_asmt_conn)

Smart assessment creation workflow

From the **Assessment Workspace**:

1. An assessment template is created from the Assessment Workspace, setting the following:

Field	Value
Purpose	This field is set to **Supplier management surveys**. **Note:** Only templates tagged with this purpose appear in the segmentation tool in the **Assessment templates** tab.
Assessment targets	This field is set to include the **Supplier** and **Segmentation rule assessment template relationship** tables.

   Assessment questions are added from the **Questions** tab of the new template.

   For more information, see Create assessment template from Assessment Workspace.

2. Optional: **Scoring** option is enabled to initiate the calculation of the assessment-level scores, which can be grouped by sections or questions. For more information, see Configure scoring for an assessment.

   Note: The smart assessment scoring plugin [com.sn_smart_scoring] must be installed for configuring scoring options.

3. User criteria for reassignment are configured and enabled, restricting contacts to delegate the assessment to another contact from their organization. If no user criteria are configured, the reassign option is available to all users without restriction. For more information, see Configure user criteria for reassigning assessments.
4. The assessment template is published after completing the preceding configurations.

From the **Source-to-Pay Workspace**:

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1. A segmentation rule is created from the Source-to-Pay Workspace. An assessment template is mapped with the new segmentation rule from the **Assessment templates** tab. The new segmentation rule can be created for the following audience types:
   - Manager(s)
   - All supplier managers
   - Only primary supplier contact(s)
   - All supplier contacts

   For more information, see Map assessment template with segmentation rule.
2. Final assessments are triggered from the Segmentation rule assessment template mapping. For more information, see Create assessments from assessment templates.

Users respond to the assessments

From the **Source-to-Pay Workspace**:

Supplier managers and owners see the assessments assigned to them under **My work** > **Open assessments** and respond to them in the workspace.

From the **Supplier Collaboration Portal**:

Supplier contacts see the assessments assigned to them under **My active items** and respond to them in the portal.

Related topics

Smart Assessment Engine

Create an assessment template

Create assessment template from Assessment Workspace

You can create smart assessment templates and add instructions, questions, and reference information by using the template designer in the Smart Assessment Engine application.

Before you begin

Smart assessments are built using the ServiceNow® Smart Assessment Engine (SAE) application. Familiarize yourself with the Smart Assessment Engine.

Role required: sn_slm.manager or sn_slm.admin

Procedure

1. Select the **Workspaces** tab and then select the **Assessment workspace**.

   For more information on creating the smart assessment template, see Create an assessment template.
2. In the **Purpose** field on the **Smart assessment template** form, select **Supplier management surveys**.
3. In the **Assessment target** field, select the following target tables:
   - Supplier [sn_fin_supplier] table
   - Segmentation rule assessment template relationship [sn_slm_segmentation_rule_m2m_asmt_template] table
4. Select **Create**.

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5. In the template designer, add instructions and questions.
   For more information, see Add instructions and questions to an assessment template.

What to do next
Configure the user criteria to restrict the reassignment of assessments from one contact to another within the organization.

Configure user criteria for reassigning assessments

You can configure the user criteria for reassigning assessments to restrict reassignment within the organization.

Before you begin
The reassignment user criteria are configured based on the **Audience type** of the assessments.

Role required: sn_slm.manager or sn_slm.admin

Procedure
1. Navigate to **Workspaces** > **Assessment workspace**.
2. Open the assessment template for which you have to configure the user criteria for reassigning assessments.
3. Open the **related lists** for the assessment template by right clicking the assessment name and selecting **Configure** > **Related Lists**.
4. Add **User criteria** to the selected related list and **Save** the form.
5. In the **User criteria** section of the assessment template, select **Edit** to update the user criteria list.
6. Add the required roles or configurations to the User criteria based on the Audience type and save the template.

Audience type	User criteria
Only primary supplier contact(s)	**Supplier: Primary Contact** (predefined)
All supplier contacts	**Supplier: Any Contact** (predefined)
Manager(s)	Set the custom criteria for primary supplier managers. For more information, see Create custom user criteria for primary managers.
All supplier managers	Set the custom criteria for all supplier managers. For more information, see Create custom user criteria for all managers.

   For example: For the audience type **All supplier contacts**, add **Supplier: Any Contact** to the user criteria list and save the template.

7. Set the status of the user criteria to active.
8. Publish the assessment template.

What to do next
Create segmentation rule, map it to the assessment template, and create assessments from the Source-to-Pay workspace.

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Create custom user criteria for primary managers

You can create custom user criteria for primary relationship managers for configuring the assessment reassignment criteria.

Before you begin

Role required: admin

Procedure

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

User Criteria form

Field	Description
Name	Unique name of the user criteria. For example, Supplier managers
Users	Users that must match the user criteria.
Groups	Groups that must match the user criteria.
Roles	Roles to match the user criteria. **Note:** ○ Because the evaluation of a role is cached in the session, any change in the role requires you to log in again. ○ User criteria are not applicable for elevated privilege roles.
Advanced	Option to display or hide the advanced option that includes the **Script** field on the User Criteria form.
Script	Add the script to define the list of all primary supplier managers (with role sn_slm.manager). This field is available when the **Advanced** option is selected on the User Criteria form.

```
<?xml version="1.0" encoding="UTF-8"?>
<unload unload_date="2026-02-24 08:42:21">
<user_criteria action="INSERT_OR_UPDATE">
<active>true</active>
<advanced>true</advanced>
<company/>
<department/>
<group/>
<location/>
<match_all>false</match_all>
<name>Supplier managers</name>
<role
 name="sn_slm.manager">da72c74043942110bb9e89e90db8
f2ef</role>
<script><![CDATA[(function isAllowed() {
    var stakeHolderGr = new
 GlideRecord('sn_slm_supplier_m2m_internal_stakehol
ders');
 stakeHolderGr.addQuery("user",user_id);
```

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Field	Description
	stakeHolderGr.addQuery("relationship_type","relationship_type_1"); stakeHolderGr.query(); return stakeHolderGr.next() })();]]></script> <short_description/> <sys_class_name>user_criteria</sys_class_name> <sys_created_by>maint</sys_created_by> <sys_created_on>2026-02-24 08:38:06</sys_created_on> <sys_domain>global</sys_domain> <sys_domain_path>/</sys_domain_path> <sys_id>902bb3bc50977250f8776d5de5c06973</sys_id> <sys_mod_count>6</sys_mod_count> <sys_name>Supplier managers</sys_name> <sys_package display_value="Global" source="global">global</sys_package> <sys_policy/> <sys_scope display_value="Global">global</sys_scope> <sys_update_name>user_criteria_902bb3bc50977250f8776d5de5c06973</sys_update_name> <sys_updated_by>maint</sys_updated_by> <sys_updated_on>2026-02-24 08:42:16</sys_updated_on> <user/> </user_criteria> </unload>
Active	Option to activate or deactivate the user criteria.
Companies	Companies that the user record must match.
Locations	Locations that the user record must match.
Departments	Departments that the user record must match.
Match All	Option to determine whether all elements from each populated user criteria field must match. If selected, only users who match all user criteria are given access. If cleared, the user must meet one or more of the set user criteria to be given access. By default, this check box is cleared so that any condition met provides a match. For example, consider a user criteria record for the following: ○ Locations A or B ○ Company C or D With **Match All** selected, only users that meet all of these conditions are matched. For example, a user with a location A and a company C. If **Match All** isn't selected, users meeting any of these conditions are matched. For example, a user with a location B.

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Field	Description
	Note: If you select **Match All**, verify that you don't create contradictory conditions that can never be met. For example, if all users in location A work for company G, the conditions in this example can never be met.

4. Select **Submit**.

Create custom user criteria for all managers

You can create custom user criteria for all managers for configuring the assessment reassignment criteria.

Before you begin

Role required: admin

Procedure

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

User Criteria form

Field	Description
Name	Unique name of the user criteria. For example, All supplier managers
Users	Users that must match the user criteria.
Groups	Groups that must match the user criteria.
Roles	Roles to match the user criteria. **Note:** ○ Because the evaluation of a role is cached in the session, any change in the role requires you to log in again. ○ User criteria are not applicable for elevated privilege roles.
Advanced	Option to display or hide the advanced option that includes the **Script** field on the User Criteria form.
Script	Add the script to define the list of all supplier managers. This field is available when the **Advanced** option is selected on the User Criteria form.

```
<?xml version="1.0" encoding="UTF-8"?>
<unload unload_date="2026-02-24 08:43:14">
<user_criteria action="INSERT_OR_UPDATE">
<active>true</active>
<advanced>false</advanced>
<company/>
<department/>
<group/>
<location/>
<match_all>false</match_all>
<name>All supplier managers</name>
```

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Field	Description
	<role name="sn_slm.manager">da72c74043942110bb9e89e90db8f2ef</role> <script><![CDATA[/** Scripted User Criteria is not cached, and evaluated everytime, so performance is dependent on the script. * Populate `answer` with true/false or evaluate to true/false * The script is evaluated in the scope the user criteria is defined * Don't use `current` in the script or populate the variable * Don't use `gs.getUser()` or `gs.getUserID()`, * instead use `user_id` which contains the user sys_id against whom the evaluation is happening. */]]></script> <short_description/> <sys_class_name>user_criteria</sys_class_name> <sys_created_by>maint</sys_created_by> <sys_created_on>2026-02-24 08:43:10</sys_created_on> <sys_domain>global</sys_domain> <sys_domain_path>/</sys_domain_path> <sys_id>0b4cfbbc50977250f8776d5de5c0693f</sys_id> <sys_mod_count>0</sys_mod_count> <sys_name>All supplier managers</sys_name> <sys_package display_value="Global" source="global">global</sys_package> <sys_policy/> <sys_scope display_value="Global">global</sys_scope> <sys_update_name>user_criteria_0b4cfbbc50977250f8776d5de5c0693f</sys_update_name> <sys_updated_by>maint</sys_updated_by> <sys_updated_on>2026-02-24 08:43:10</sys_updated_on> <user/> </user_criteria> </unload>
Active	Option to activate or deactivate the user criteria.
Companies	Companies that the user record must match.
Locations	Locations that the user record must match.
Departments	Departments that the user record must match.
Match All	Option to determine whether all elements from each populated user criteria field must match. If selected, only users who match all user criteria are given access. If cleared, the user must meet one or more of the set user criteria to be given access. By default, this check box is cleared so that any condition met provides a match. For example, consider a user criteria record for the following:

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Field	Description
	○ Locations A or B ○ Company C or D With **Match All** selected, only users that meet all of these conditions are matched. For example, a user with a location A and a company C. If **Match All** isn't selected, users meeting any of these conditions are matched. For example, a user with a location B. **Note:** If you select **Match All**, verify that you don't create contradictory conditions that can never be met. For example, if all users in location A work for company G, the conditions in this example can never be met.

4. Select **Submit**.

Map assessment template with segmentation rule

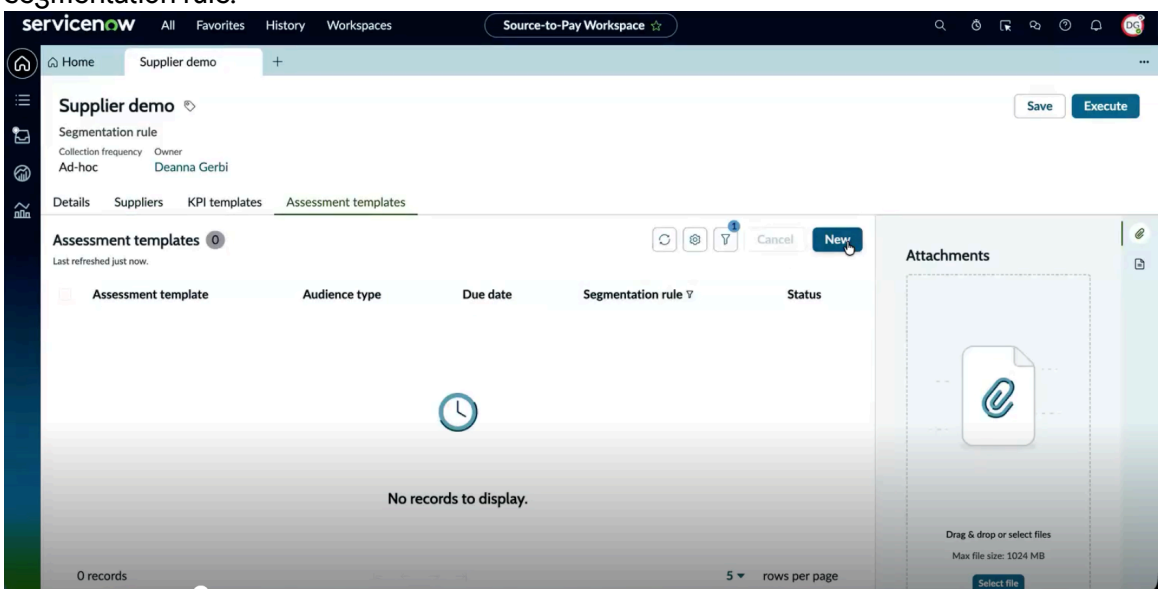
You can map assessment templates with segmentation rules in the Source-to-Pay workspace. A rule defines which suppliers receive assessments based on the configured criteria.

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. Create a segmentation rule.
   For more information, see Create segmentation rule.
3. Select **Assessment templates** and **New** to map an assessment template with this segmentation rule.



4. Fill in the details in the new segmentation rule assessment template form.

Field	Description
Assessment template	Assessment template used for mapping with the segmentation rule.

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Field	Description
Audience type	Type of recipients of the assessment.
Segmentation rule	Segmentation rule for which assessment is getting created (auto-filled).
Due date	Date of expiry of the assessment.

5. Select **Save**.

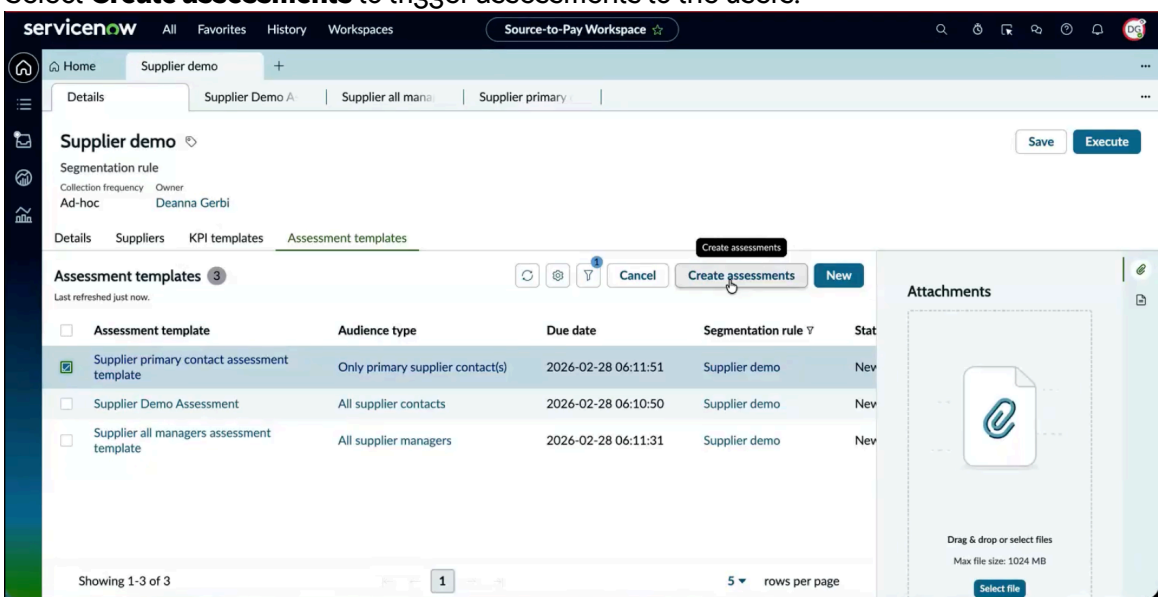
What to do next
Trigger assessments from the segmentation rule assessment mapping templates.

Create assessments from assessment templates

After mapping the assessment templates with segmentation rules, supplier managers manually trigger batch creation of assessments.

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. Open the segmentation rule for which assessment templates have been created.
3. In the **Assessment templates** tab, select the assessment template mapping record for which assessments have to be triggered.
4. Select **Create assessments** to trigger assessments to the users.



Result
The assessment is created and runs in the background. The status of the assessment changes as it progresses.

State	When it occurs
New	When the Assessment Template Relationship record is created.

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State	When it occurs
In Progress	When **Create Assessment** is clicked, all UI validations are completed, the selected record is validated as eligible, and the assessment instance creation process begins.
Complete	When the assessment creation process is successfully completed for all valid assignees.
Cancelled	When cancelled using the **Cancel** related list action. The Assessment Template Relationship record and all related assessment instances move to the Cancelled state.
Error	When an error occurs during assessment creation, or when assessment instance creation fails for one or more assignees. The Assessment Template Relationship record moves to the Error state.

Integrate Supplier Lifecycle Operations with other applications

Extend the capabilities of Supplier Lifecycle Operations by integrating with other applications.

Supplier Lifecycle Operations integrations

Supplier Lifecycle Operations (SLO) supports the following integrations:

Supplier Lifecycle Operations integration framework

The Supplier Lifecycle Operations integration framework connects ServiceNow with third-party ERP systems, enabling the exchange of supplier data across multiple ERP instances.

For more information, see Supplier Lifecycle Operations integration framework.

Craft.co Integration for Supplier Lifecycle Operations

This integration between Craft and Supplier Case Management surfaces supplier risk intelligence directly within Supplier Lifecycle Operations.

For more information, see Craft.co Integration for Supplier Lifecycle Operations.

News Integration for Supplier Lifecycle Operations

This integration 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.

For more information, see News Integration for Supplier Lifecycle Operations.

Relish Integration for Supplier Lifecycle Operations

This integration between Relish Data Assure and Supplier Case Management brings supplier data assurance checks into Supplier Lifecycle Operations.

For more information, see Relish Integration for Supplier Lifecycle Operations.

FedEx Dataworks Integration for Supplier Lifecycle Operations

FedEx Dataworks brings logistics intelligence into Supplier Lifecycle Operations, surfacing shipping patterns and delivery data to support supplier onboarding and risk decisions.

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For more information, see FedEx Dataworks Integration for Supplier Lifecycle Operations.

Third-party application integrations

Supplier Lifecycle Operations integrates integrates with the following third-party ERP applications.

ERP Integration Framework

The Source-to-Pay Operations ERP Integration Framework connects ServiceNow® with third-party ERP systems, enabling data exchange for purchase orders, receipts, invoices, fixed assets, and tax information across multiple ERP instances.

For more information, see ERP Integration Framework.

Supplier Lifecycle Operations integration with SAP

Exchange supplier and primary data between Supplier Lifecycle Operations and SAP ECC and SAP S/4HANA from your ServiceNow® instance.

For more information, see Source-to-Pay integration with SAP.

Supplier Lifecycle Operations integration with Oracle EBS

Handle sales orders, procurement, finance, and other operations in Oracle EBS from your ServiceNow® instance.

For more information, see Source-to-Pay integration with Oracle EBS.

Supplier Lifecycle Operations integration with SAP Ariba

Handle sales orders, procurement, finance, and other operations in SAP Ariba from your ServiceNow® instance.

For more information, see Source-to-Pay integration with SAP Ariba.

Supplier Lifecycle Operations integration with Coupa

Manage business spend and automate approvals, contracts, inventory, purchase orders, requisitions, suppliers, and user management in Coupa from your instance.

For more information, see Source-to-Pay integration with Coupa.

Supplier Lifecycle Operations integration with Oracle Financial Cloud

Sync supplier data from ServiceNow® to Oracle Financial Cloud.

For more information, see Source-to-Pay integration with Oracle Financial Cloud.

Supplier Lifecycle Operations integration framework

The Supplier Lifecycle Operations (SLO) integration framework enables you to exchange supplier data with any third-party ERP system.

Important: Check your entitlements to determine whether you have access to Supplier Lifecycle Operations integration framework.

The SLO integration framework facilitates inbound and outbound integration with third-party applications and ERP systems.

SLO integration framework flow

For inbound flow:

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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.

SLO inbound staging tables

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

SLO outbound staging tables

The following table lists the SLO outbound staging tables and the application they belong to.

SLO outbound staging tables

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.

Related topics

Add supplier inbound data in an Excel file

Load supplier data

Add supplier inbound data in an Excel file

You can import supplier inbound table data in an Excel file.

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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.

Related topics

Load supplier data

Load supplier data

Load the supplier data from the excel template into the supplier inbound staging tables.

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 Add supplier inbound data in an Excel file.
6. Enter the **Sheet number** of the excel template that needs to be loaded into the staging table.

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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.

Related topics
Add supplier inbound data in an Excel file

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 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.

Related topics
Monitor the integration status of the SLO inbound data import

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

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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:
     - 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.

Related topics

Run transform to update supplier primary data

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 Case Management plugin.

Important: Check your entitlements to determine whether you have access to Craft.co Integration for Supplier Lifecycle Operations.

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 Case Management.

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.

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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.

To	Do this
Synchronize with external thid-party application for the first time	Do the following: **a.** Select **Connect to external data**. **b.** In the Connect to external data dialog box, select **Import**. The latest supplier data is imported and any changes that you made to the existing supplier data and the supplier locations are overwritten.
Synchronize with external third-party application subsequently after initial synchronization	Do the following: **a.** Select **Sync with external data**. **b.** In the Sync with external data? dialog box, select **Sync**. The latest supplier data is imported and any changes that you made to the existing supplier data and the supplier locations are overwritten.

Related topics

Craft.co Integration for Supplier Lifecycle Operations

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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.

Important: Check your entitlements to determine whether you have access to News Integration for Supplier Lifecycle Operations.

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.

Related topics

- Configure the Supplier News REST message
- Configuring a custom API to dynamically fetch supplier news

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**.

Related topics

- News Integration for Supplier Lifecycle Operations
- Configuring a custom API to dynamically fetch supplier news

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.

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Related topics

Create a REST message for a custom API

Add and configure the Get News data resource in UI Builder

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.

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.

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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.

Related topics

Add and configure the Get News data resource in UI Builder

Update the field names in the UX client script

Add and configure the Get News data resource in UI Builder

Configure the Get News - Composite data resource to display 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**.

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The Query Params dialog box is displayed.

e. On the **Edit JSON** tab, enter the query parameters, and then select **Apply**.

f. In the **Response Base Path** field, enter the top-level object to retrieve information from.

You can also specify nested objects.

g. In the **Response Field List** field, select **Edit**.

The Response Field List dialog box is displayed.

h. On the **Edit JSON** tab, enter the fields that you want to display in the response, and then select **Apply**.

Note: Specifying specific fields enables you to retrieve filtered responses for REST endpoints. The response includes only the requested fields and objects.

9. Select **Save**.

Related topics

Create a REST message for a custom API

Update the field names in the UX client script

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.

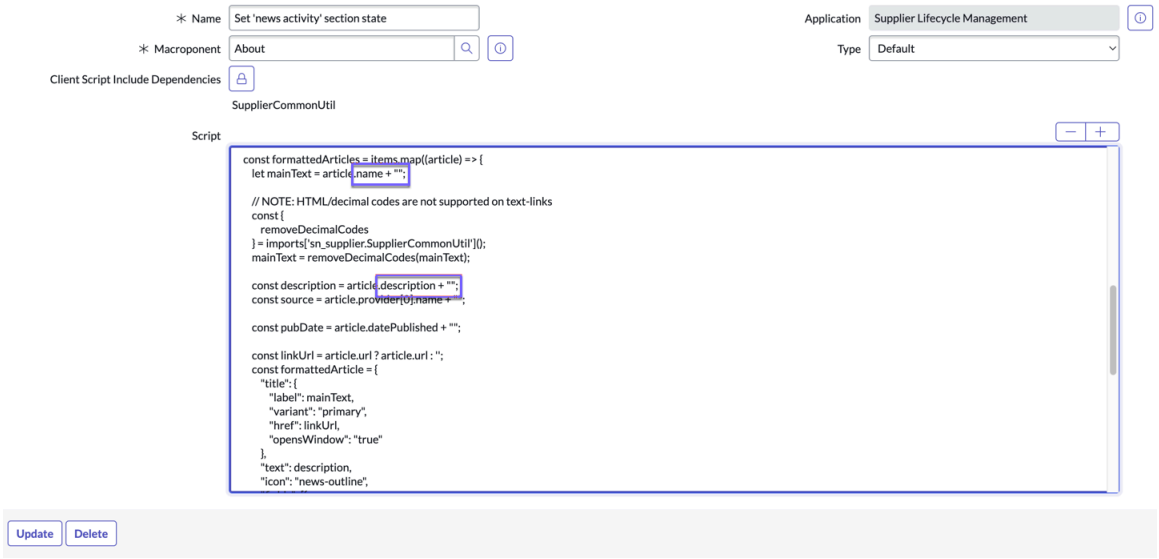
Before you begin
Role required: admin

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.

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5. Select **Update**.

Related topics

Create a REST message for a custom API

Add and configure the Get News data resource in UI Builder

Relish Integration for Supplier Lifecycle Operations

The SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) provides an integration between Relish and the Supplier Case Management plugin.

> **Important:** Check your entitlements to determine whether you have access to Relish Integration for Supplier Lifecycle Operations.

Relish is a third-party supplier intelligence platform that validates supplier data while working on supplier cases. The integration supports the following validation types:

- Supplier location validation for location change requests
- Banking information and bank account ownership validation for banking details change requests
- Tax information validation for tax change requests
- Sanction screening for compliance verification

For more information, see Review supplier information using Relish.

To install the SLO Connector for Relish Data Assure, the following plugins must be installed:

- **Required plugins**:
  - SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec)
  - Relish Data Assure (x_reliq_relish_dat)
- **Dependent plugins**:
  - Source-to-Pay integration framework (sn_spend_intg)
  - Supplier Operations (com.snc.sn_so)

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After SLO Connector for Relish Data Assure is installed, Relish shares the client ID and password. A basic authentication profile must be created using the client ID and password. For more information, see Set up authentication profile using Relish credentials.

Related topics

Set up authentication profile using Relish credentials

Set up authentication profile using Relish credentials

Set up a basic authentication profile using Relish credentials to enable web service integration.

Before you begin
Role required: admin

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 Relish.
Password	Password as provided by Relish. 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 Relish configuration. This alias is auto-populated when you create an authentication profile from a credential alias.

7. Click **Submit**.

Result
The authentication profile is now linked and can be tested.

Related topics

Relish Integration for Supplier Lifecycle Operations

FedEx Dataworks Integration for Supplier Lifecycle Operations

FedEx Dataworks brings logistics intelligence into Supplier Lifecycle Operations, surfacing shipping patterns and delivery data to support supplier onboarding and risk decisions.

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About FedEx Dataworks

FedEx Dataworks combines unmatched, proprietary real-world data signals with advanced analytics to power ServiceNow Source-to-Pay workflows. Relationship managers can use these signals during supplier onboarding to validate suppliers, evaluate risk, and benchmark supplier performance — without leaving the supplier workspace.

Note: Check your entitlements to determine whether you have access to FedEx Dataworks for Supplier Lifecycle Operations. This integration is available starting with the Australia September 2026 release.

How the FedEx Dataworks integration works

The integration uses an outbound request table owned by the Source-to-Pay integration framework scope. The FedEx Dataworks app on the platform listens to this table and populates responses. No direct API configuration is required on the Supplier Lifecycle Operations side to start using the integration beyond installing the S2P Integration FedEx Connector app.

If a request to FedEx Dataworks fails or doesn't receive a response in time, the system retries the request. Retries apply to supplier validation, risk assessment, risk assessment template retrieval, and supplier performance benchmarking requests.

The number of retries and the wait time between them are defined in the script of the **FedEx integration attributes** record in the S2P Custom Configuration table. The script contains the following attributes:

- *retry_count*: Number of times the system retries a request before marking it as failed. The default value is 1.
- *retry_timeout_seconds*: Time, in seconds, that the system waits before retrying a request. The default value is 120.

Administrators can change these values in the script to specify the number of retries and wait time between them.

The integration introduces a new data collection type called Integration for KPI templates and KPIs. This collection type enables automated data retrieval from external sources such as FedEx Dataworks. When you install the S2P Integration FedEx Connector app, demo data is loaded that includes KPI templates configured with the Integration data collection type.

Key features

The FedEx Dataworks integration includes the following features:

Supplier validation in supplier onboarding Registration stage

Verifies a supplier's details against FedEx Dataworks records to establish a FedEx Dataworks Supplier ID. This step is part of the supplier onboarding playbook and is required before risk assessment or performance benchmarking data can be retrieved. For more information, see Validate supplier using FedEx Dataworks.

FedEx Dataworks risk assessment in supplier onboarding Qualification stage

Returns risk factor ratings for a matched supplier, covering customs risk, restricted country screening, and dangerous goods risk. Risk assessment is available in the supplier onboarding playbook after a successful supplier match. For more information, see Evaluate supplier risk using FedEx Dataworks.

Supplier performance benchmarking

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Retrieves FedEx Dataworks logistics performance metrics for a matched supplier, displayed in a dedicated section on the supplier profile page. For more information, see View supplier metrics using FedEx Dataworks.

Demo data

The S2P Integration FedEx Connector app includes demo data that provides a foundation for using FedEx Dataworks features. The demo data includes:

- Two KPI templates: Customs delay rate and Shipments claim rate
- Threshold sets for each KPI template with four default thresholds
- A Shipping performance domain record
- Threshold values for the KPI templates
- An ERP source record for FedEx Dataworks

The KPI templates use the Integration data collection type and reference FedEx Dataworks as the external source. When FedEx Dataworks sends performance data, KPIs are created for specific suppliers based on these templates.

Prerequisites

Confirm that the following apps are installed:

- Source-to-Pay integration framework
- Supplier Operations
- Supplier Relationship and Performance Management

For more information about installing Supplier Lifecycle Operations applications, see Configure Supplier Lifecycle Operations.

To use FedEx Dataworks for Supplier Lifecycle Operations, install the S2P Integration FedEx Connector app and load the demo data. For more information, see Install the S2P Integration FedEx Connector.

Related topics

Install the S2P Integration FedEx Connector

Validate supplier using FedEx Dataworks

Evaluate supplier risk using FedEx Dataworks

View supplier metrics using FedEx Dataworks

Install the S2P Integration FedEx Connector

Install the S2P Integration FedEx Connector app to enable the FedEx Dataworks integration in Supplier Lifecycle Operations.

Before you begin

Create a basic authentication profile using the FedEx Dataworks guidelines.

Role required: admin

About this task

The S2P FedEx Integration Connector is a Store app that enables Supplier Lifecycle Operations to communicate with FedEx Dataworks. The app includes demo data that must be loaded for the

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integration to work correctly. After installation and demo data loading, FedEx Dataworks features become available in the supplier onboarding playbook and on the supplier profile page.

Procedure

1. Navigate to the ServiceNow Store and search for `S2P FedEx Integration Connector`.
2. Select **Get** to install the app on your instance.
3. Verify that the installation completed without errors.
   The installation process typically completes within a few minutes. You can monitor progress in the System Logs.
4. Load the demo data by navigating to **System Applications** > **Applications**, locating the S2P Integration FedEx Connector app, and selecting **Load Demo Data**.
   The demo data includes KPI templates, threshold sets, a Shipping performance domain, and an ERP source record for FedEx Dataworks. This data is required for FedEx Dataworks to function correctly.
   The system loads the demo data into your instance.
5. Verify that the demo data loaded correctly by navigating to **Supplier Lifecycle Operations** > **Performance Management** > **KPI Templates** and confirming that the Customs delay rate and Shipments claim rate templates are present.
6. For each FedEx Dataworks related KPI template, verify that the **External source** field is populated with FedEx Dataworks.
   The **External source** field is hidden by default on the KPI template form. To view this field, customize the form layout. If the field is empty for FedEx Dataworks related templates, populate it manually with FedEx Dataworks from the ERP source table to prevent integration failures.
7. Retrieve the FedEx Dataworks risk assessment template.
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Search for and open the *`Trigger FedEx Risk Assessment template pull - [Monthly]`* scheduled job.
   c. Select **Execute Now**.
   This scheduled job runs automatically on the first day of each month. Run it once manually after installation so that the risk assessment template is available before supplier managers run a FedEx Dataworks risk assessment for a supplier.

Result

The FedEx Dataworks features are now available in the supplier onboarding playbook and on the supplier profile page for suppliers. The demo data provides KPI templates that FedEx Dataworks uses to create supplier-specific KPIs.

What to do next

To start using the FedEx Dataworks integration, initiate a supplier's onboarding and match their details to establish a FedEx Dataworks Supplier ID. For more information, see Validate supplier using FedEx Dataworks.

Related topics

- FedEx Dataworks Integration for Supplier Lifecycle Operations
- Validate supplier using FedEx Dataworks
- Evaluate supplier risk using FedEx Dataworks
- View supplier metrics using FedEx Dataworks

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Validate supplier using FedEx Dataworks

Supplier validation connects a supplier's location to a FedEx Dataworks record, returning a FedEx Dataworks Supplier ID that unlocks risk assessment and performance benchmarking data for that supplier.

Before you begin

Role required: sn_slm.manager

About this task

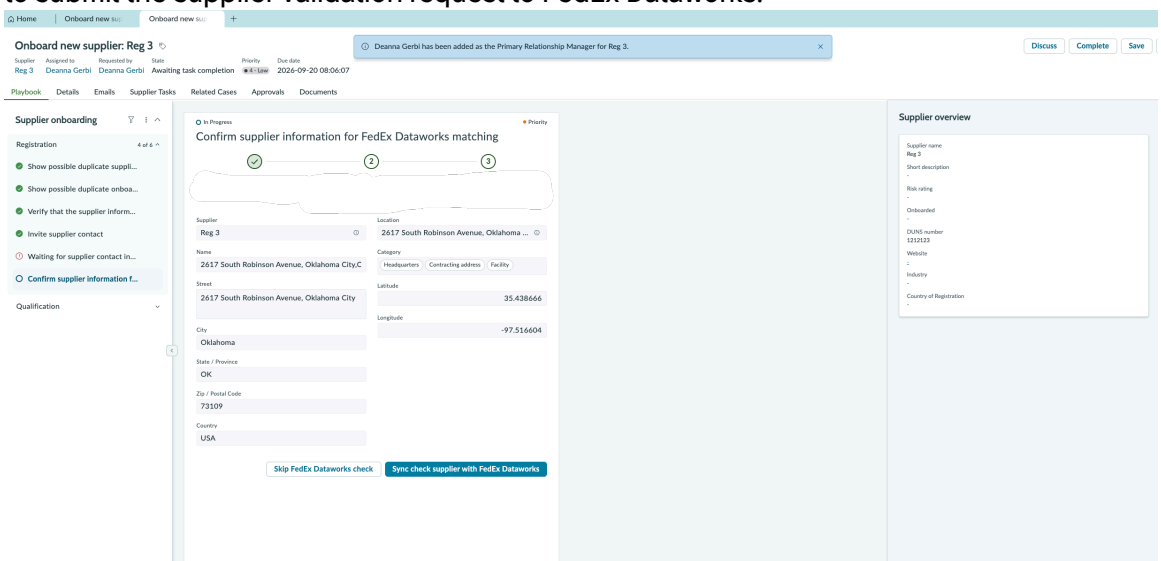
In the supplier onboarding playbook, FedEx Dataworks supplier validation appears as additional steps in the Registration stage. A relationship manager selects the supplier's location and sends a match request to FedEx Dataworks. FedEx Dataworks searches its records for the supplier and returns a result.

Note: This step is optional. Relationship managers can skip supplier validation and continue the onboarding playbook without FedEx Dataworks data. If supplier validation is skipped or returns no result, FedEx Dataworks risk assessment and performance benchmarking data aren't available for that supplier.

For more information about the regular onboarding process without FedEx Dataworks, see Use the supplier onboarding playbook to onboard suppliers.

Procedure

1. In the supplier onboarding playbook, navigate to the **Registration** stage.
   Complete the initial steps. The **Confirm supplier information for FedEx Dataworks matching** step appears next.
2. Select the supplier location from the location field.
   The location field defaults to **Headquarters**. Select an alternate location if the supplier has multiple locations registered in the system.
3. Select **Check supplier with FedEx Dataworks** or **Sync check supplier with FedEx Dataworks** to submit the supplier validation request to FedEx Dataworks.



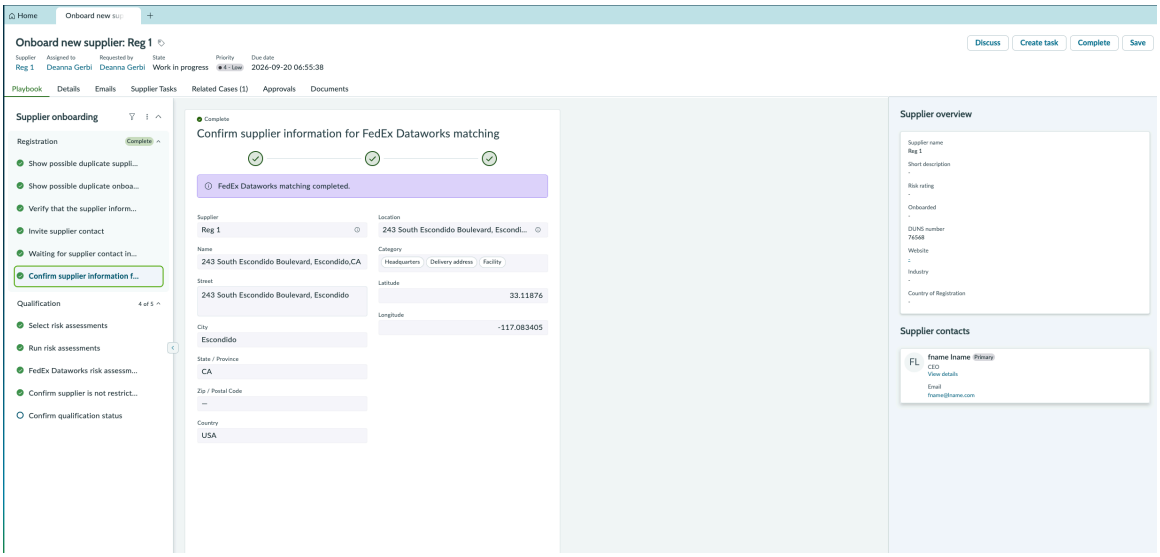
   Supplier Lifecycle Operations sends the supplier's details (including the DUNS number) and location to FedEx Dataworks using an outbound request table.
4. Wait for the validation response from FedEx Dataworks.
   FedEx Dataworks app on the platform listens to the outbound request table and populates the response. The response typically returns within a few seconds.

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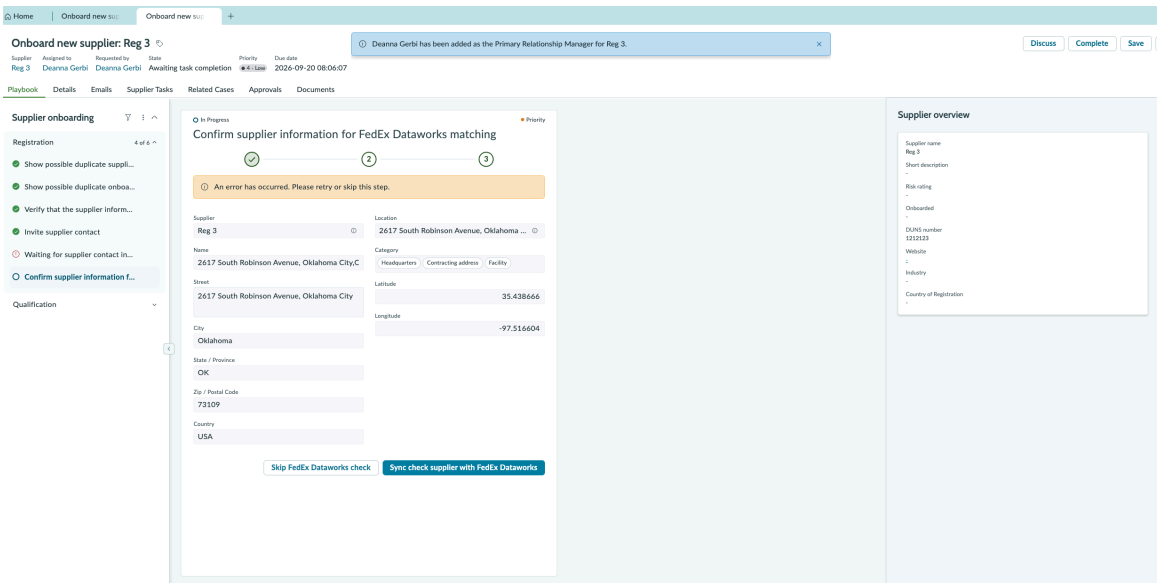
Result

One of the following outcomes occur:

- FedEx Dataworks recognizes the supplier: A FedEx Dataworks Supplier ID is returned and stored on the supplier record. FedEx Dataworks risk assessment and performance benchmarking becomes available.



- FedEx Dataworks does not recognize the supplier: A "no supplier found" response is returned. No FedEx Dataworks data is displayed for that supplier.



You can retry with the **Resync check supplier with FedEx Dataworks** button or skip the FedEx Dataworks check.

- Supplier validation is skipped: No FedEx Dataworks Supplier ID is assigned.

  FedEx Dataworks risk assessment and performance benchmarking aren't available for that supplier. The message times out after one minute.

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Note: While the supplier validation is in progress, continue with the next step of risk assessment with Third-Party Risk Management (TPRM). However, FedEx Dataworks risk assessment and FedEx Dataworks supplier performance benchmarking are not activated unless supplier validation is completed.

What to do next

After successful supplier validation, you can proceed with FedEx Dataworks risk assessment during the Qualification stage of the onboarding playbook.

Related topics

- FedEx Dataworks Integration for Supplier Lifecycle Operations
- Install the S2P Integration FedEx Connector
- Evaluate supplier risk using FedEx Dataworks
- View supplier metrics using FedEx Dataworks

Evaluate supplier risk using FedEx Dataworks

FedEx Dataworks risk assessment returns logistics-based risk factor ratings for a matched supplier, helping relationship managers evaluate supplier risk during onboarding.

Before you begin

FedEx Dataworks risk assessment is available only for suppliers that have a FedEx Dataworks Supplier ID. If supplier validation was not completed or returned no result, the risk assessment option is read-only and cannot be selected.

The risk assessment template must be available on your instance. Your administrator must run the *Trigger FedEx Risk Assessment template pull - [Monthly]* scheduled job at least once after installing the **S2P Integration FedEx Connector**. For more information, see Install the S2P Integration FedEx Connector.

Role required: sn_slm.manager

About this task

In the supplier onboarding playbook, FedEx Dataworks risk assessment is available as additional steps in the Qualification stage, after successful supplier validation. A relationship manager opts in to the assessment and submits a request. FedEx Dataworks evaluates the supplier and returns risk factor ratings within seconds.

Risk factors: Risk factors and their definitions are owned and maintained by FedEx Dataworks. FedEx Dataworks can add or remove risk factors at any monthly cycle.

Risk assessment states: The risk assessment flow in the onboarding playbook progresses through three states: Select, Run, and Results.

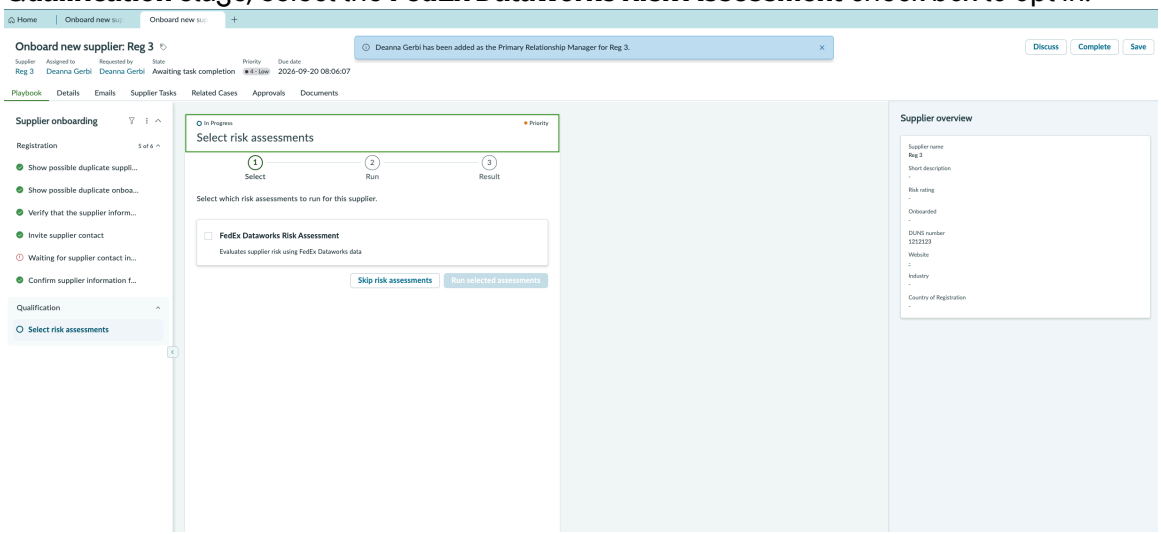
FedEx Dataworks risk factor ratings: Each risk factor is rated High, Medium, or Low. Ratings are color-coded: High is displayed in red, Medium in yellow, and Low in green.

Risk assessment template: The *Trigger FedEx Risk Assessment template pull - [Monthly]* scheduled job runs on the first day of each month to retrieve the latest risk assessment template from FedEx Dataworks. The template defines which risk factors are returned for any supplier assessment that month. The template applies to all suppliers globally for that month and is not supplier-specific.

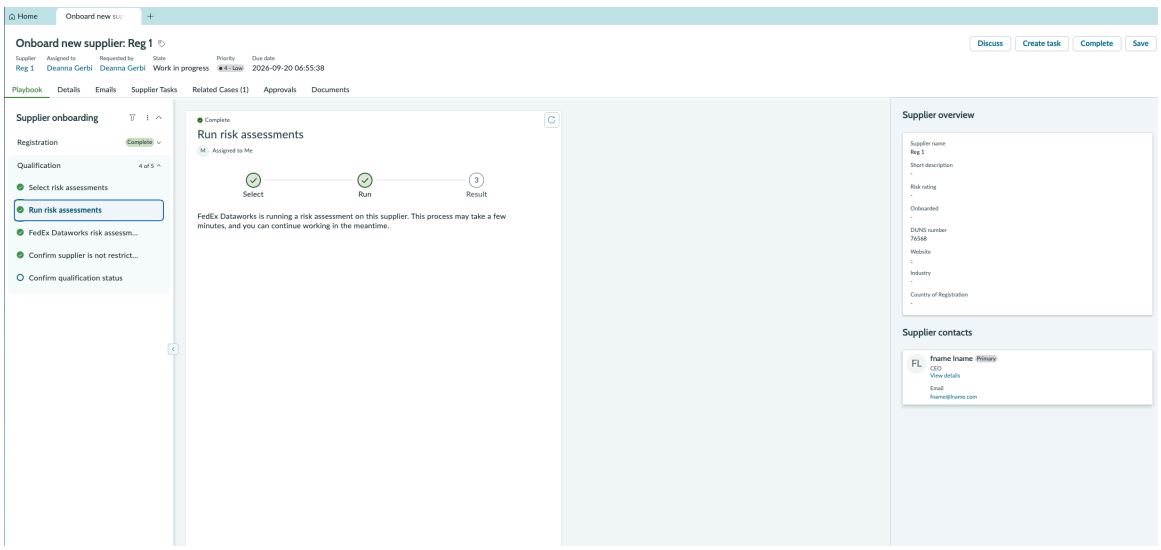
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Procedure

1. In the supplier onboarding playbook, when you reach the **Select risk assessments** step in the **Qualification** stage, select the **FedEx Dataworks Risk Assessment** check box to opt in.



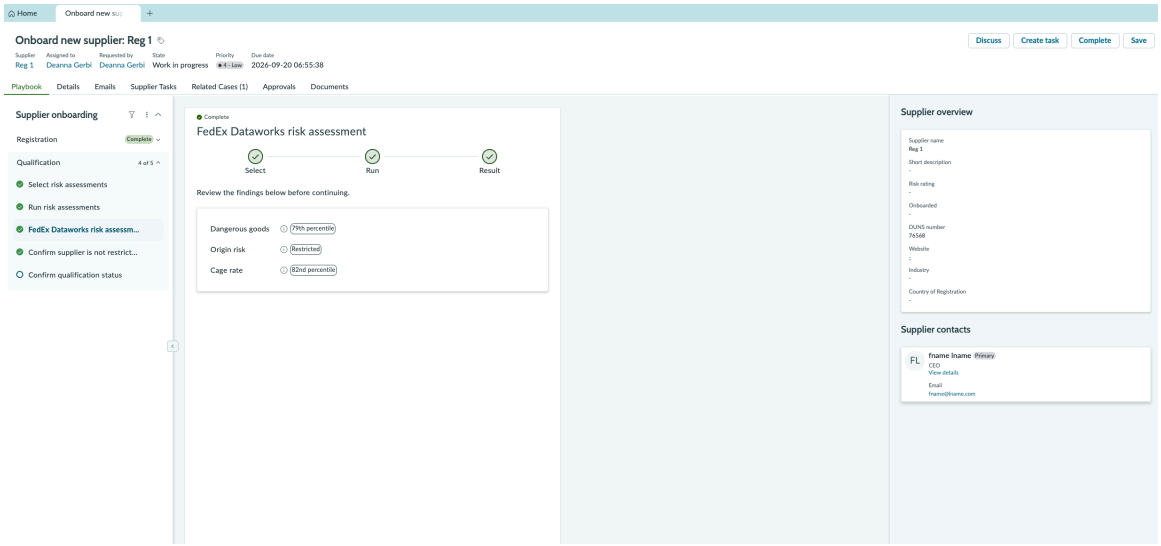
2. Select **Run selected Assessments**.



The system sends an outbound request to FedEx Dataworks for risk evaluation. Results are returned and displayed in the playbook within seconds.

3. View the risk evaluation results.

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FedEx Dataworks risk factors

Risk factor	Description	Measurement scale
Origin country risk	Indicates if the given supplier address is in a restricted or sanctioned country, which may prevent shipping or require additional compliance steps.	Boolean (Restricted=1, Not Restricted=0)
Customs risk	Indicates the risk of customs delays or issues that may affect the shipment.	Percentile
Dangerous goods risk	Indicates the risk associated with the shipment of dangerous goods.	Percentile

Related topics

- FedEx Dataworks Integration for Supplier Lifecycle Operations
- Install the S2P Integration FedEx Connector
- Validate supplier using FedEx Dataworks
- View supplier metrics using FedEx Dataworks

Fetch KPI data using FedEx Dataworks

FedEx Dataworks integration lets you retrieve KPI data for a given supplier to create KPIs.

Before you begin

Role required: sn_slm.manager
The supplier must have a valid FedEx Dataworks Supplier ID. Complete supplier validation during the onboarding process in the Registration phase.

About this task

The **Fetch KPI from FedEx Dataworks** button is accessible from the supplier profile page in the Source-to-Pay Workspace.

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Note: The **Fetch KPI from FedEx Dataworks** button is only visible for suppliers that have a FedEx Dataworks Supplier ID. Only suppliers with completed supplier validation display this button.

Procedure

1. Open the supplier profile page for a supplier with a FedEx Dataworks Supplier ID.
   Navigate to the supplier list, search for the supplier by name, and open the supplier record.
2. Select **Fetch KPI from FedEx Dataworks**.
   An outbound request for performance evaluation is sent to FedEx Dataworks using the KPI templates provided in the demo data. The demo data includes two KPI templates: Customs delay rate and Shipments claim rate. These templates use the Integration data collection type and reference FedEx Dataworks as the external source.

Result

KPIs are created for the supplier. You can view the KPIs under the **KPI management** tab.

Related topics

FedEx Dataworks Integration for Supplier Lifecycle Operations

Install the S2P Integration FedEx Connector

View supplier metrics using FedEx Dataworks

FedEx Dataworks supplier performance benchmarking retrieves FedEx Dataworks logistics performance metrics for a matched supplier, displayed on the supplier profile page to support supplier evaluation.

Before you begin

Role required: sn_slm.manager
The supplier must have a valid FedEx Dataworks Supplier ID. Supplier validation must be completed during the onboarding process in the Registration phase.

About this task

FedEx Dataworks supplier performance benchmarking is accessible from the supplier profile page in the Source-to-Pay Workspace for suppliers that have a FedEx Dataworks Supplier ID. Relationship managers can retrieve FedEx Dataworks logistics performance metrics for those suppliers on demand.

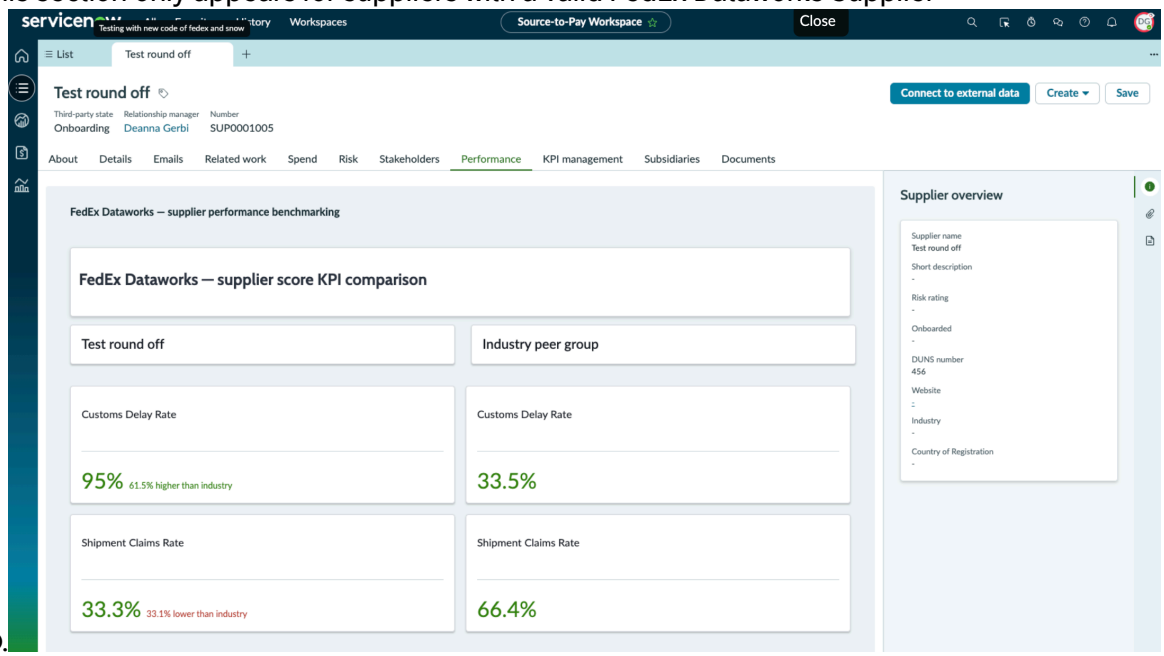
Note: The **FedEx Dataworks - supplier performance benchmarking** section is only visible for suppliers that have a FedEx Dataworks Supplier ID. Suppliers who haven't completed FedEx Dataworks validation don't see this section.

Procedure

1. Open the supplier profile page for a supplier with a FedEx Dataworks Supplier ID.
   Navigate to the supplier list, search for the supplier by name, and open the supplier record.
2. Navigate to the **Performance** tab.
3. Locate the FedEx Dataworks - supplier performance benchmarking section.

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This section only appears for suppliers with a valid FedEx Dataworks Supplier ID.



The FedEx Dataworks performance metrics are presented as key-value pairs that show logistics performance data for the selected supplier.

Performance metrics are defined and supplied by FedEx Dataworks. Metrics are returned as key-value pairs and displayed directly from the FedEx Dataworks response. The specific metrics available depend on FedEx Dataworks's latest data and may vary by supplier.

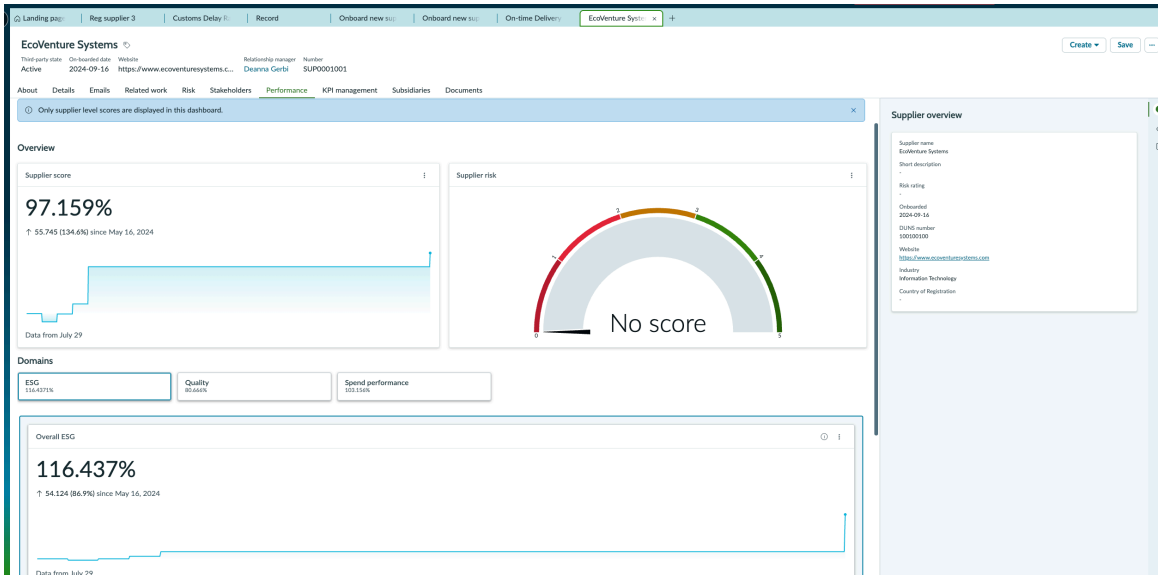
Note: If FedEx Dataworks adds a new performance metric, it is reflected the next time performance data is retrieved, with no dependency on a scheduled job.

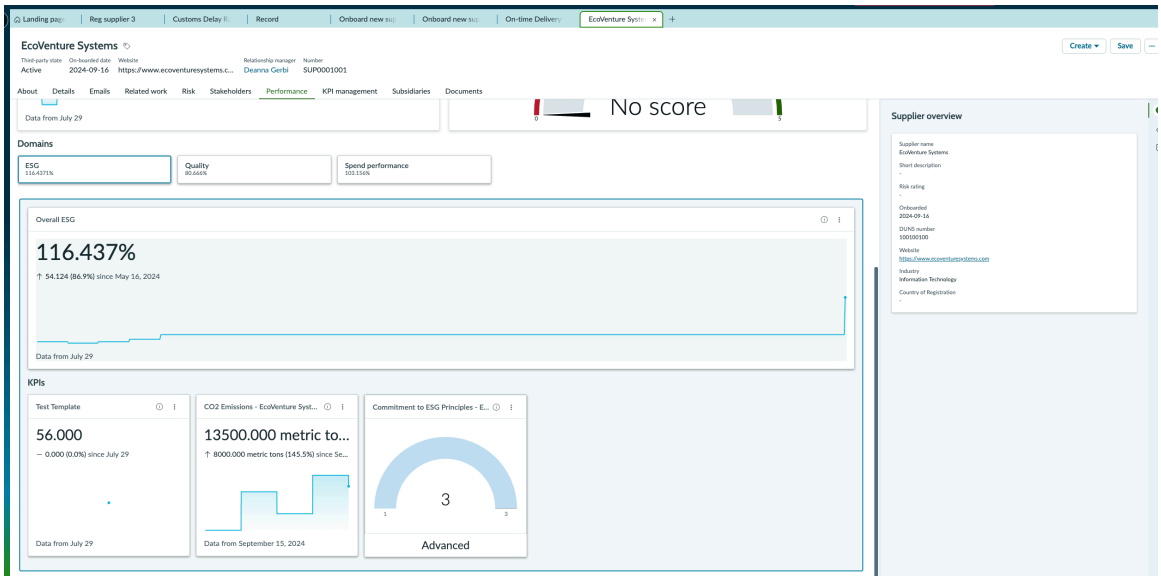
Performance metrics

Performance metrics	Description	Rating scale
Customs Delay Rate	Peer group average percentage for similar industry suppliers, indicates the average percent of shipments that were held or delayed during customs clearance processes over the past year.	0% and above
Shipment Claims Rate	Peer group average percentage for similar industry suppliers, indicates the average percent of shipments that had associated claims over the past year.	0% and above

4. Review additional performance metrics including supplier score, supplier risk, domain scores, Overall ESG score, and KPI performance data.

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What to do next

Use the performance metrics to evaluate supplier performance and make informed decisions about supplier relationships and risk management.

Related topics

- FedEx Dataworks Integration for Supplier Lifecycle Operations
- Install the S2P Integration FedEx Connector
- Validate supplier using FedEx Dataworks
- Evaluate supplier risk using FedEx Dataworks

Use Supplier Lifecycle Operations

Supplier managers and supplier contacts can use Supplier Lifecycle Operations to accelerate supplier onboarding, minimize supplier risk, and maximize productivity.

Related topics

- Using Source-to-Pay Workspace
- Using Supplier Collaboration Portal

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Using Supplier Relationship and Performance Management

Using Supplier Payment Optimization

Using Source-to-Pay Workspace

As a supplier manager, use the Source-to-Pay Workspace to import or create suppliers, add key contacts, add supplier locations, and manage the supplier cases assigned to you.

Important: Starting with the Washington D.C. release, Supplier Manager Workspace is being prepared for future deprecation. It will be hidden from the navigation and no longer be activated on new instances. Source-to-Pay Workspace provides the latest experience for this functionality.

Related topics

Create a supplier from the Source-to-Pay Workspace

Using Supplier Collaboration Portal

Using Supplier Relationship and Performance Management

Using Supplier Payment Optimization

Manage supplier tasks from the Source-to-Pay Workspace

Interaction Management in Supplier Lifecycle Operations

Create a supplier from the Source-to-Pay Workspace

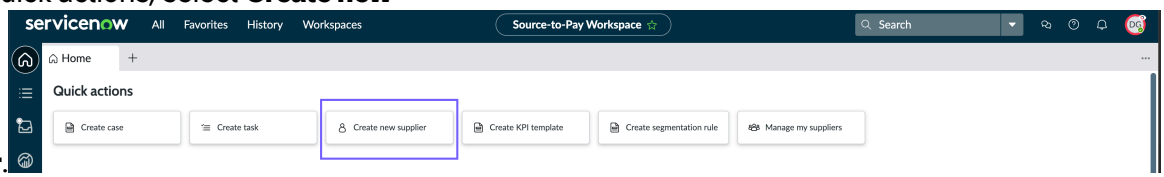
Create a supplier to quickly onboard the supplier using playbooks and start purchasing goods and services.

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.

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Field	Description
	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.
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 Use the supplier onboarding playbook to onboard suppliers.

Related topics

Use the supplier onboarding playbook to onboard suppliers

Add a subsidiary for a supplier from the Source-to-Pay Workspace

Perform risk assessment playbook

Use 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.

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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.

When using a playbook, a supplier owner or supplier manager can:

- View the playbook stages and activities.
- View status indicators that display the current state of each activity or step.
- View check boxes that indicate the stage you are currently at in the workflow.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to complete the case.

Supplier onboarding playbook

You can use the Supplier onboarding playbook to onboard a new supplier. The Supplier onboarding playbook provides the activities and tasks that a supplier owner or supplier manager can perform during the onboarding process.

You can use the Supplier onboarding playbook with cases that are created using the Onboard a Supplier case type.

The Supplier onboarding playbook appears in the **Playbook** tab on the Case Details page in the Source-to-Pay Workspace.

After you submit a supplier onboarding request, the application creates a new case of type Onboard a Supplier and opens the Case Details page. You can select the **Playbook** tab and start the supplier onboarding process using playbook. For more information on creating a supplier, see Add a supplier.

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.

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.

Related topics

Add a subsidiary for a supplier from the Source-to-Pay Workspace

Perform risk assessment playbook

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Registration stage

The following table lists the activities in the Registration stage of the Supplier onboarding playbook.

Registration stages 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.
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.

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Registration stages of the Supplier onboarding playbook (continued)

Activity	Activity Details
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: • **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.

Note: If **FedEx Dataworks** is integrated, the following additional step appears in the playbook:

Confirm supplier information for FedEx Dataworks matching

Verifies a supplier's details against FedEx Dataworks records to establish a FedEx Dataworks Supplier ID. This step is part of the supplier onboarding playbook and is required before risk assessment or performance benchmarking data can be retrieved. For more information, see Validate supplier using FedEx Dataworks.

Qualification stage

The following table lists the activities in the Qualification stage of the Supplier onboarding playbook.

Stages in Supplier onboarding playbook

Activity	Activity Details
Check if Risk assessment for supplier	Checks whether the risk assessment for supplier plugin is installed.

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Stages in Supplier onboarding playbook (continued)

Activity	Activity Details
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 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:

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Stages in Supplier onboarding playbook (continued)

Activity	Activity Details
	• **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.

Note: If **FedEx Dataworks** is integrated, the following option appears in the playbook in the **Select risk assessments** step:

FedEx Dataworks Risk Assessment

If selected, returns the risk factor ratings for a matched supplier, covering customs risk, restricted country screening, and dangerous goods risk. Risk assessment is available in the supplier onboarding playbook after a successful supplier match. For more information, see Evaluate supplier risk using FedEx Dataworks.

Activation stage

The following table lists the activities in the Activation stage of the Supplier onboarding playbook.

Activities in 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: • **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**.

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Activities in the Supplier onboarding playbook (continued)

Activity	Activity Details
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.

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.

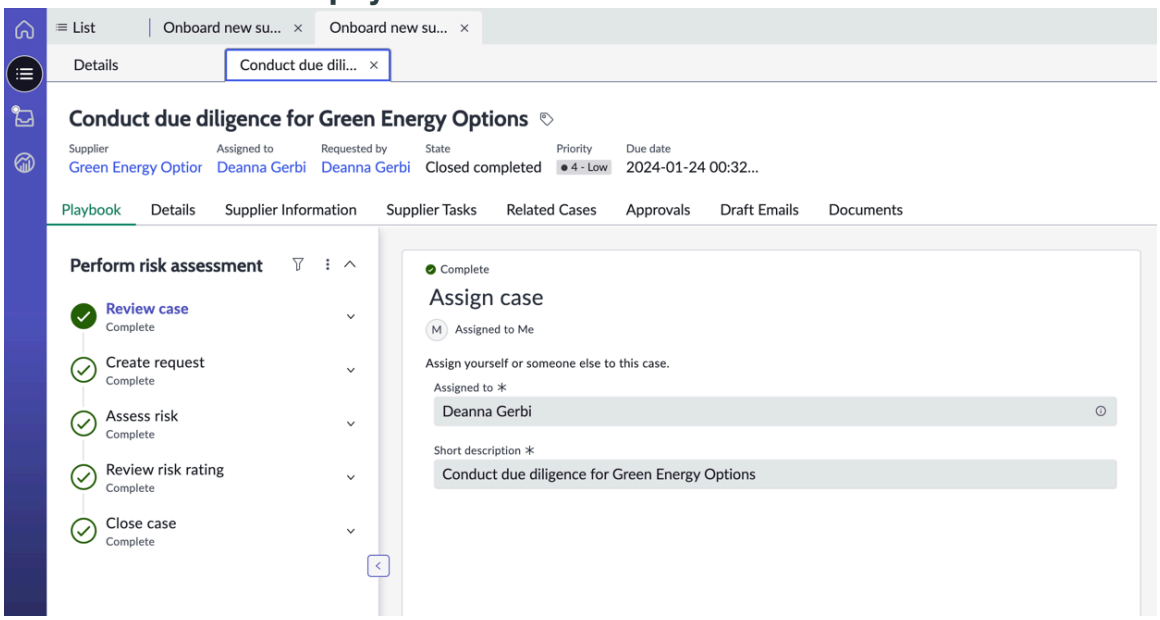
Perform risk assessment playbook

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 for risk assessment

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.

Related topics

Use the supplier onboarding playbook to onboard suppliers

Add a subsidiary for a supplier from the Source-to-Pay Workspace

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.

In this flow, the following occurs:

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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 Use 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.

Related topics

Playbook stages and activities when only Vendor Risk Management is installed

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.

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.

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Perform risk assessment playbook stages and activities (continued)

Stage	Activity	Activity Details
	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.

Related topics

Risk assessment flow when only Vendor Risk Management is installed

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] 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.

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 Use 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).

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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.
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.

Related topics

Playbook stages and activities when Third-party Risk Due Diligence is installed

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:

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Perform risk assessment playbook stages and activities (continued)

Stage	Activity	Activity Details
		• **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: ○ 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.

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Perform risk assessment playbook stages and activities (continued)

Stage	Activity	Activity Details
	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.

Related topics

Risk assessment flow when Third-party Risk Due Diligence is installed

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.

https://player.vimeo.com/video/1154389282?h=3577ee51d7&badge=0&autopause=0&player_id=0&app_id=58479

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 for which you want to add a subsidiary.
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**.

Result

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.

Related topics

Use the supplier onboarding playbook to onboard suppliers

Perform risk assessment playbook

Manage supplier details

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**.

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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**
- **Emails**
- **Related work**
- **Spend**
- **Risk**
- **Stakeholders**
- **Performance**
- **KPI management**
- **Subsidiaries**
- **Documents**

About tab

The **About** tab displays information about the supplier, supplier relationship, similar suppliers, and supplier locations.

Sections on the About tab

Title	Description
Sections	
Supplier details	Displays supplier details, such as legal name, DUNS number, country of registration, stock symbol, number of employees. 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

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Sections on the About tab (continued)

Title	Description
	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 • Tax information
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 Case Management. 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.
Stakeholders	Displays internal stakeholders and supplier contacts associated with a supplier. Internal stakeholders are internal users with a unique relationship type such as Procurement manager or Category manager. To view a list of all the internal stakeholders, select the **View stakeholders** option. For more information on adding and managing internal stakeholders, see Manage internal stakeholders. Supplier contacts are associated external users. Primary supplier contact is indicated with a Primary tag. To view a list of all the external stakeholders, select the **View supplier contacts** link. For more information on adding and managing supplier contacts, see Manage supplier contacts from the Source-to-Pay Workspace. **Note:** The **View stakeholders** and **View supplier contacts** links are displayed only if the supplier has more than five internal stakeholders or supplier contacts respectively.
Option	

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Sections on the About tab (continued)

Title	Description
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.
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.
Option to fetch KPI data from FedEx	Select **Fetch KPI from FedEx**: Enables you to fetch KPI data from FedEx when **S2P FedEx Integration Connector** is installed. **Note:** The KPI data is fetched using the demo data templates. For more information, see Fetch KPI data using FedEx Dataworks.
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. • **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.

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Sections on the About tab (continued)

Title	Description
Option to delete a supplier	Select the see actions icon (⋯) and select **Delete** to delete a supplier.

Details tab

The **Details** tab displays information about the supplier.

Note: The fields on this tab are editable. You can update the supplier details and select **Save** to save the data.

Fields on the Details tab

Field	Description
Supplier	
Number	An auto-generated number that uniquely identifies a supplier.
Legal name	Name of the supplier.
ERP supplier code	Company code of the supplier in the ERP system.
Parent entity	Name of the parent company of the supplier.
Global company	Name of the global company of the supplier.
Relationship manager	Person responsible for managing the relationship with this supplier.
Relationship status	Business relationship that is designated to the supplier. The options are Strategic, Valued, Tactical, or Excluded.
Onboarded	Whether the supplier is onboarded. The options are Yes or No.
Preferred	Whether the supplier is preferred. The options are Yes or No.
General	
Street address	Street where the supplier is located.
City	City where the supplier is located.
State / Province	State or province where the supplier is located.
Country	Country where the supplier is located.
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.

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Emails tab

The **Emails** tab displays the list of emails sent to and received from the supplier. It includes all emails related to tasks, cases, and other interactions related to the supplier.

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.
Contracts	Displays a list of contracts created for suppliers.
Action plans	Displays a list of existing action plans.
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. **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.

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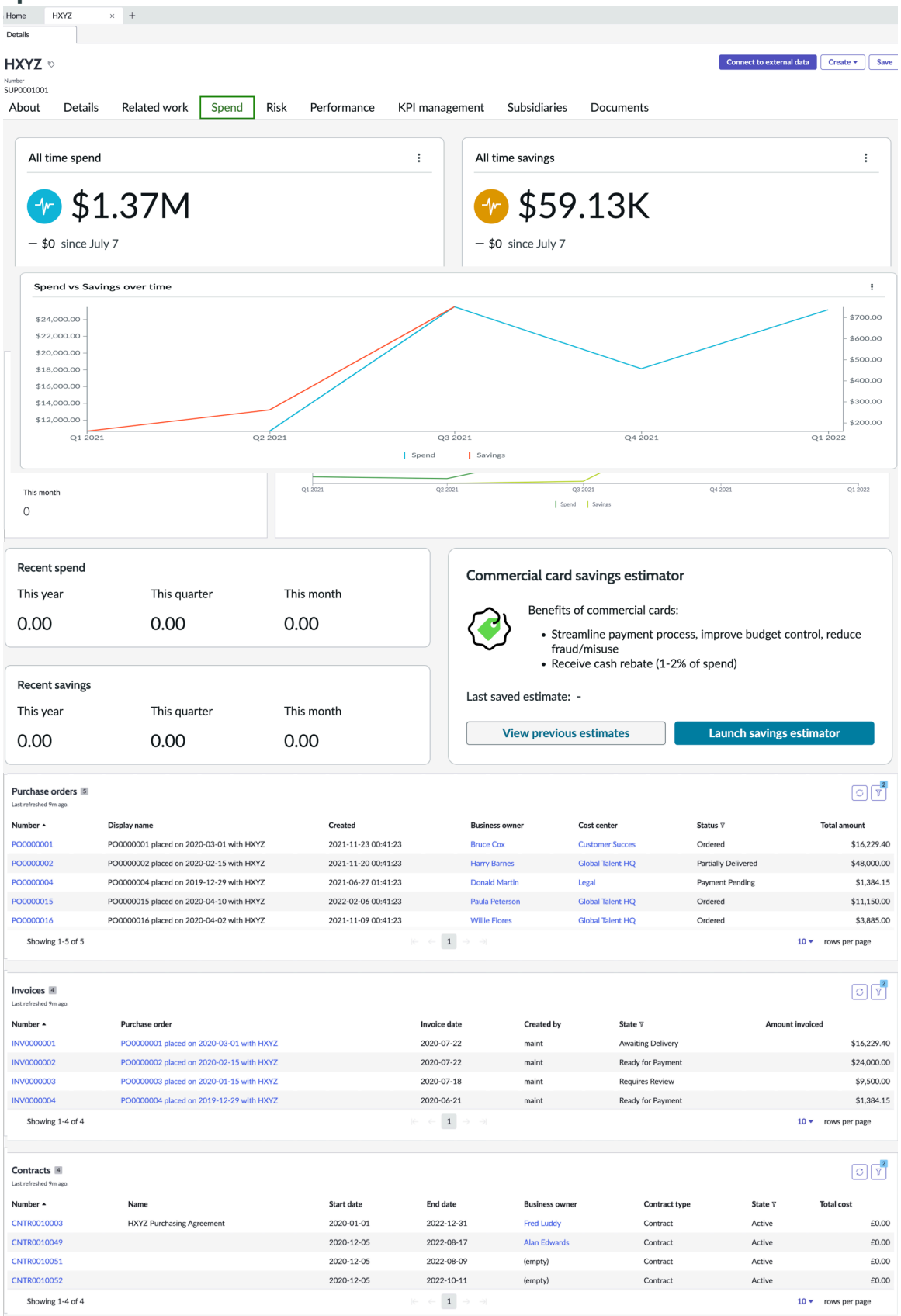
Note:

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



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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.
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.
Credit card savings estimator		
Last saved estimate	View	Displays the value of the last estimate of potential savings from credit card payments calculated using the savings calculator.
View previous estimates	Widget	Displays a list of the last estimates calculated using the savings calculator.
Launch savings estimator	Widget	Launches the commercial card savings value calculator. The saving estimation tool can be used to calculate potential savings from credit card payments. The tool uses default values and allows users to modify billing cycles and other parameters to create new estimates.
Purchase orders		

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Sections on the Spend tab (continued)

Title	Type	Description
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.
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.

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Sections on the Spend tab (continued)

Title	Type	Description
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.

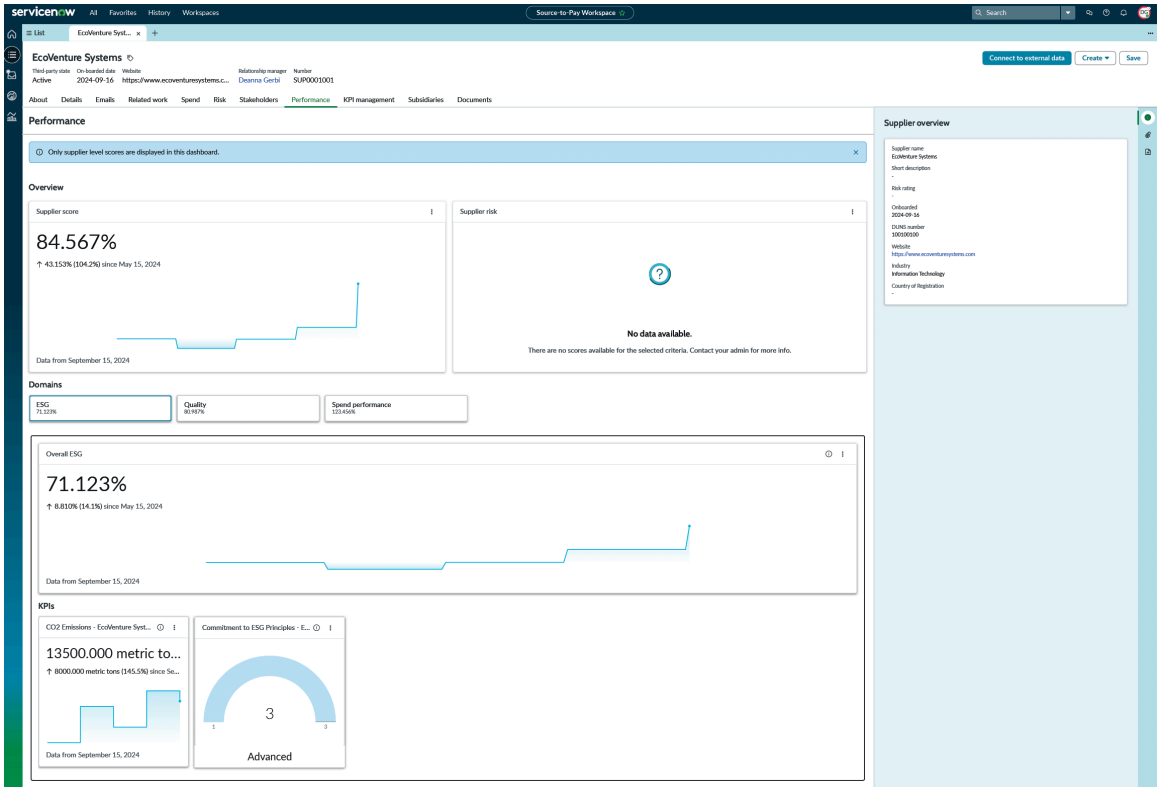
To know more about the information displayed on the **Risk** tab, see Viewing summarized risk information for a third party.

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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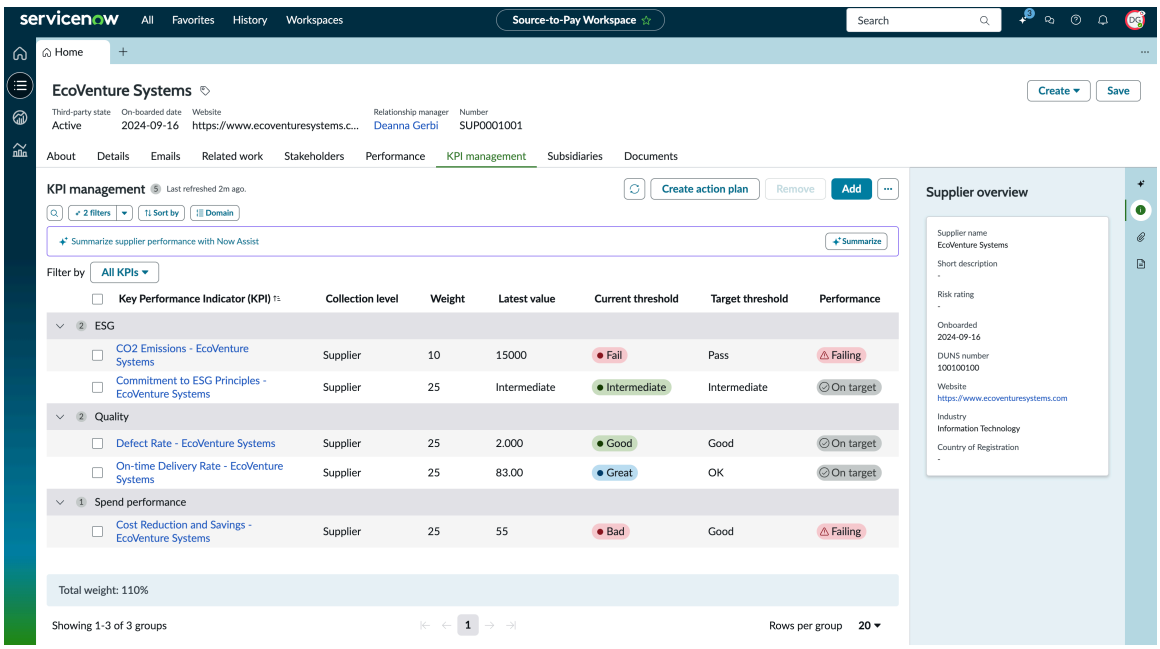


To know more about the information displayed on the **Performance** tab, see View supplier performance dashboard.

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

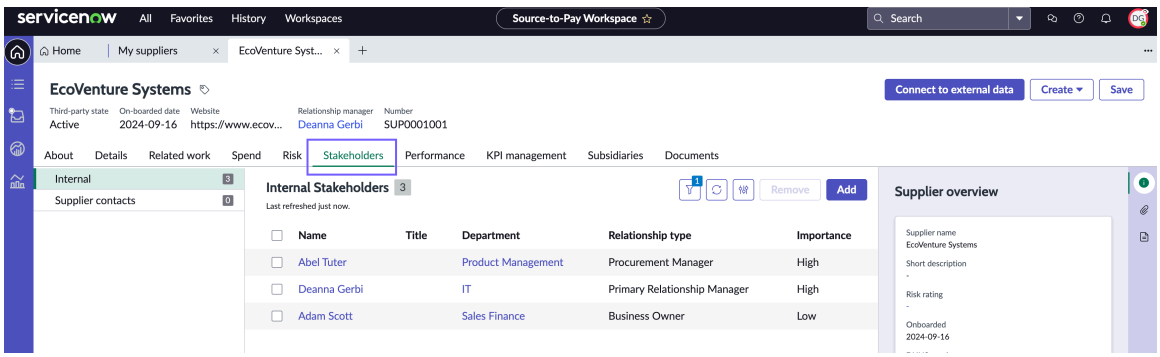
The **Subsidiaries** tab displays all the subsidiaries of the supplier.

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.

Stakeholders

The **Stakeholders** tab helps you manage internal stakeholders and supplier contacts associated with a supplier. You can complete the following operations from this tab:

- View a list of internal stakeholders and supplier contacts
- Add internal stakeholders with a unique relationship type to the supplier
- Remove or update internal stakeholder details
- Add, remove, or update supplier contacts
- Manage access for primary contact role



For more information on the stakeholders tab, see Manage internal stakeholders and Manage supplier contacts 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.

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

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.

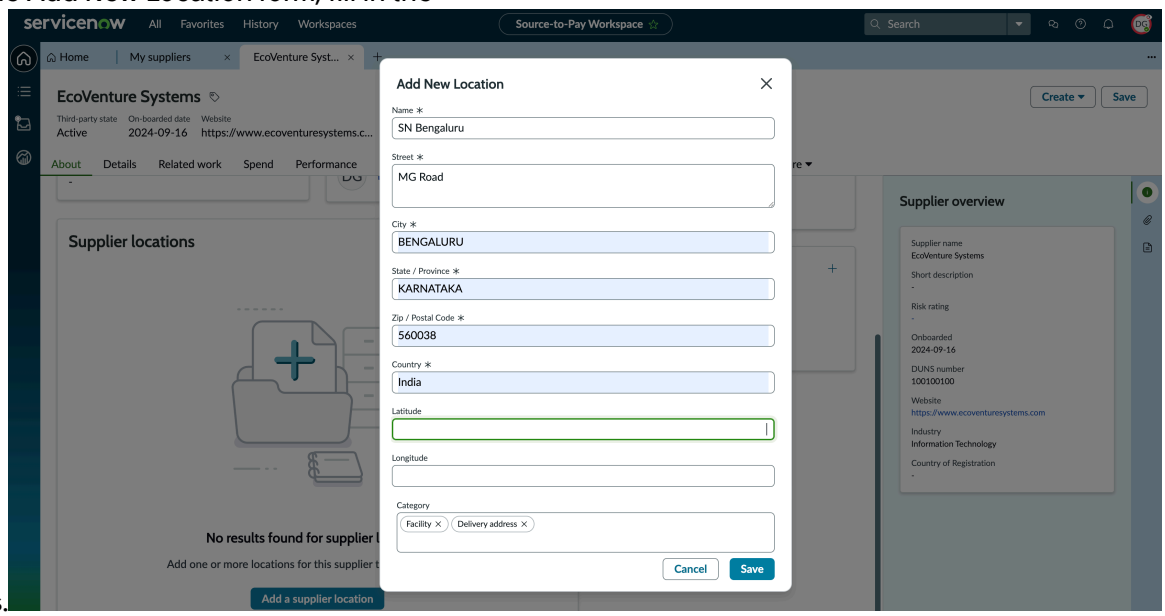
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About this task

- If a supplier has multiple locations, at least one location should be set as headquarters.
- If a new supplier location is set as headquarters (HQ) or if any updates are made to the existing HQ supplier location, the location details of the HQ supplier location is updated in the supplier record.
- When you update the supplier location details in a supplier record, the location details are updated in the supplier location record as well.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Manage my suppliers**.
3. Under My suppliers, select the legal name of the supplier that you want to add a supplier location for.
4. On the **About** tab, under Supplier Locations, select the add supplier location icon ( ).
5. On the Add New Location form, fill in the fields.



For more information about the form fields and descriptions, see Fields in the Add New Location form.

6. Select **Save**.

Result

The new supplier location is added in the system.

Related topics

Using Source-to-Pay Workspace

Edit supplier details from the Source-to-Pay Workspace

Edit supplier details from the Source-to-Pay Workspace

Add or modify the details of an existing supplier.

Before you begin

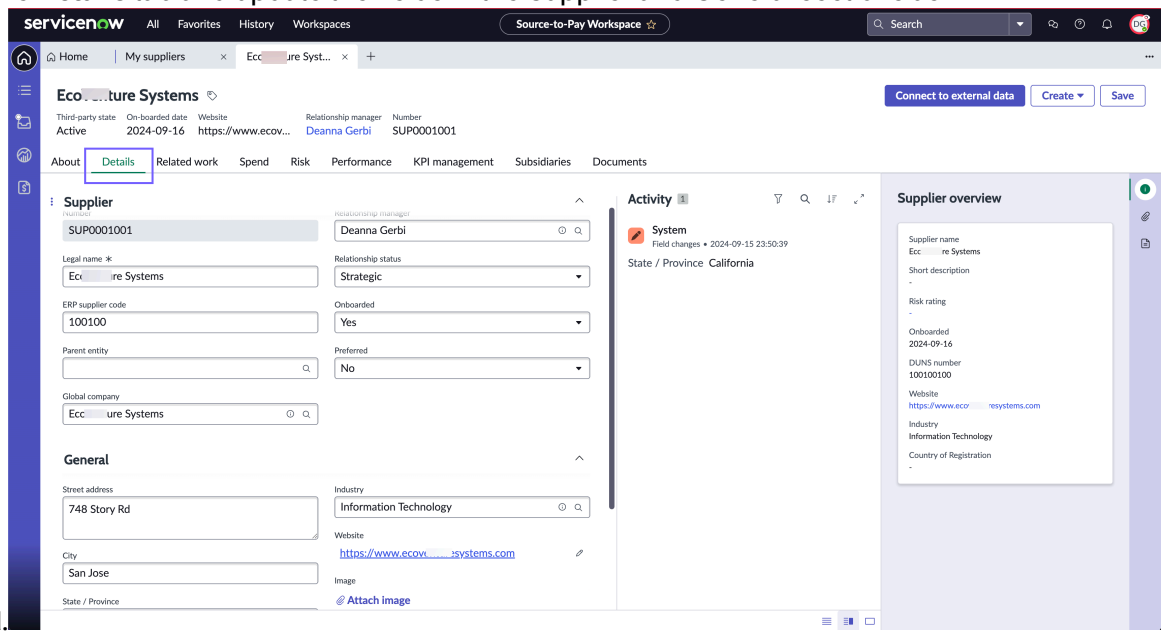
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

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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 Manage 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 Manage supplier details.
4. Select **Save**.

Result

The edited supplier details are updated in the system.

Related topics

Using Source-to-Pay Workspace

Add a supplier location from the Source-to-Pay Workspace

Manage documents from the Source-to-Pay Workspace

Manage documents by uploading, updating and downloading the required documents from the Source-to-Pay Workspace.

Before you begin

Ensure that you have created a supplier document configuration. For more information, see Supplier Document Management.

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

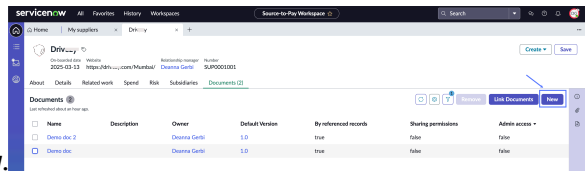
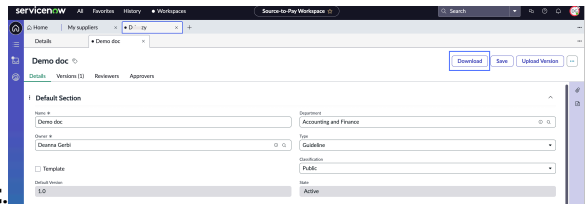
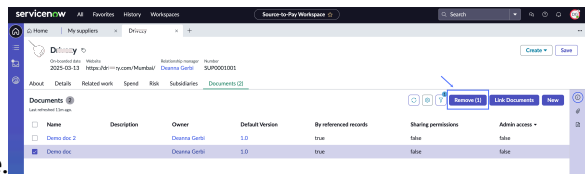
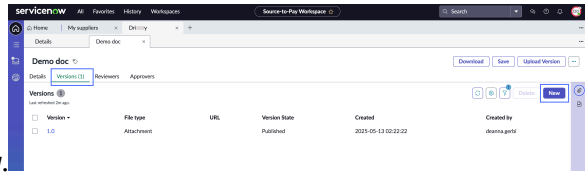
About this task

The **Documents** tab contains the **Link Documents** option, which enables you to quickly add an already uploaded document without creating a new one. Access to the **Link Documents** option is controlled by the user criteria you set on the **Manage access** tab when creating the supplier document configuration. For more information, see Create a supplier document configuration.

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Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier.
   The supplier details page is displayed.
3. Select the **Documents** tab and do one of the following.

To	Do this
Upload a document	**a.** Select **New**.  **b.** On the Create New Documents form, fill in the fields. For a description of the field values, see Fields in the Create New Documents form. **c.** Select **Submit**.
Download a document	**a.** In the Name column, select the link to a document to open it. **b.** Select **Download Document**. 
Remove a document	**a.** Select the check box next to the document name. **b.** Select **Remove**. 
Upload a new version of a document	**a.** In the Name column, select the link to a document to open it. **b.** Do one of the following: ▪ Select **Upload Version**. ▪ Select the **Versions** tab and then select **New**. 

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To	Do this
	c. On the Create New Versions form, under Attachments, select **Browse** to upload the new version of the document. **d.** Select **Save**. A new version of the document is created and displayed in the **Versions** tab.

Result
The required action is completed for the selected document.

Related topics
Using Source-to-Pay Workspace

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.

This playbook is used for updating the supplier primary data when:

- A supplier contact submits a request for updating the supplier primary data using the supplier catalog item from the Supplier Collaboration Portal
- A supplier manager or fulfiller creates a case for updating the supplier primary data from the Source-to-Pay Workspace

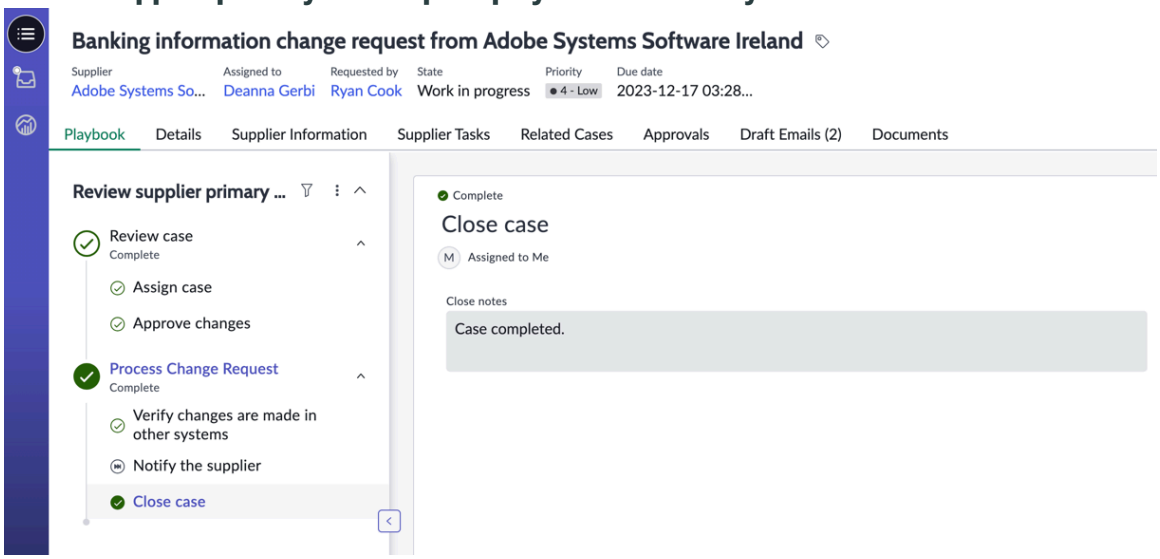
The application opens the case on the **Playbook** tab on the Details page.

This playbook is displayed only for these case types:

- Banking information change request
- Supplier information change request
- Supplier location change request
- Conduct sanction screening

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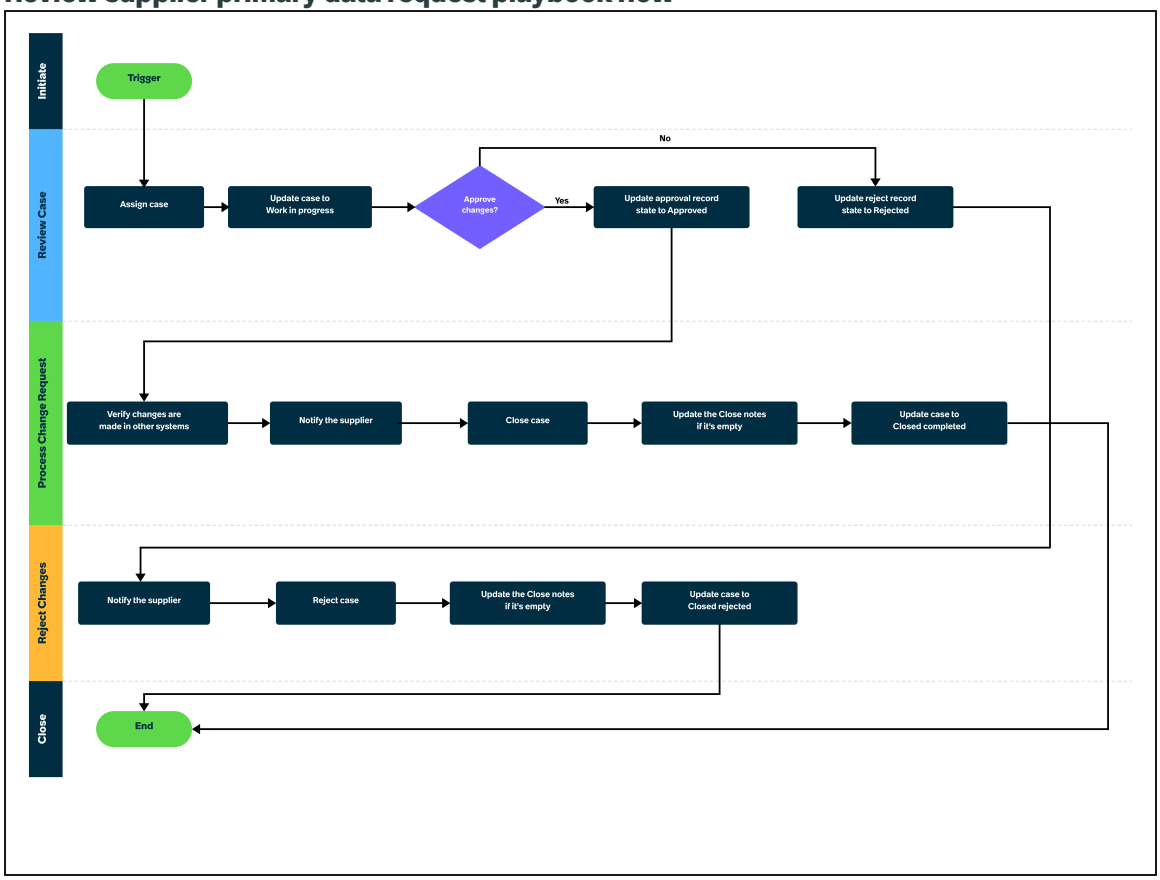
Review supplier primary data request playbook on the Playbook tab



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.

Review supplier primary data request playbook flow



Review supplier primary data request playbook stages and activities

The playbook contains the following stages and activities.

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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. 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.

Related topics

- Manage supplier cases from the Source-to-Pay Workspace
- Configure due dates for supplier cases
- Case playbook for specific supplier case types
- Create a case on behalf of a supplier from the Source-to-Pay Workspace

Manage internal stakeholders

Internal stakeholders represent key relationship types associated with a supplier such as Business owner, Category manager, or Procurement manager. Mapping internal stakeholders to a unique relationship type enhances governance data visibility and facilitates effective relationship management with a supplier.

You can add internal stakeholders with unique relationship types and remove non-essential internal stakeholders from the Source-to-Pay Workspace.

Each internal stakeholder can be assigned only one of the following relationship types:

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- Primary Relationship Manager
- Secondary Relationship Manager
- Procurement Manager
- Category Manager
- Contract Manager
- Business Owner

Note: You can configure all relationship types, except the Primary Relationship Manager type, to align with your business requirements.

Internal stakeholders with Primary Relationship Manager relationship type must be assigned the [sn_slm.owner] role manually, which enables them to view, create, and update stakeholders for the associated supplier. All relationship types, other than Primary Relationship Manager, are for reference only. For more information on roles and their description, see Components installed with Supplier Case Management.

Related topics

Add internal stakeholders from the Source-to-Pay Workspace

Remove internal stakeholders from the Source-to-Pay Workspace

Add internal stakeholders from the Source-to-Pay Workspace

Assign relationship types such as Primary relationship manager and Category manager to internal users associated with a supplier.

Before you begin

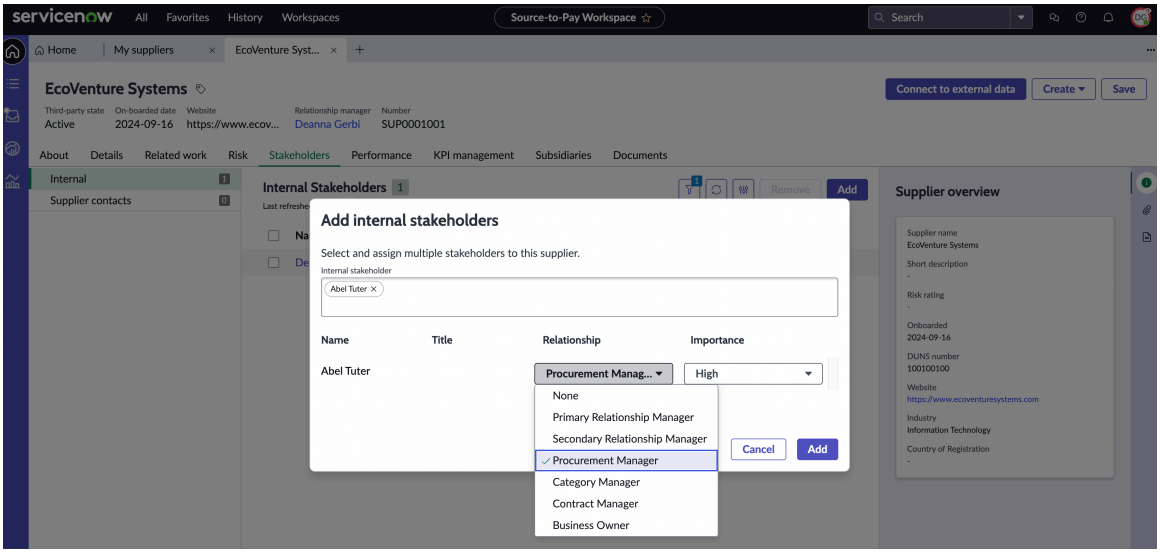
Role required: sn_slm.owner, sn_slm.manager, sn_slm.admin

Note: Users with the sn_slm.owner role can add stakeholders only for the suppliers that they manage. Users with sn_slm.manager and sn_slm.admin roles can add stakeholders for any supplier.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick Actions, select **Manage my suppliers**.
3. Select the legal name of the supplier for which you want to add a supplier contact.
   The supplier details page is displayed.
4. Navigate to the **Stakeholders** tab, and then select **Internal**.
5. Select **Add**.
6. In the **Internal stakeholders** field, enter the name of the user that you want to add as an internal stakeholder.
   You can add more than one user by entering multiple email addresses separated by a comma.
7. From the Relationship type drop-down, select the user's relationship type with the supplier.

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8. From the **Importance** drop-down, select how critical the stakeholder is to the supplier relationship.
9. Select **Add**.

Result

The user is added to the list of internal stakeholders on the **Stakeholders** tab.

Remove internal stakeholders from the Source-to-Pay Workspace

Remove non-essential internal stakeholders from the Source-to-Pay Workspace.

Before you begin

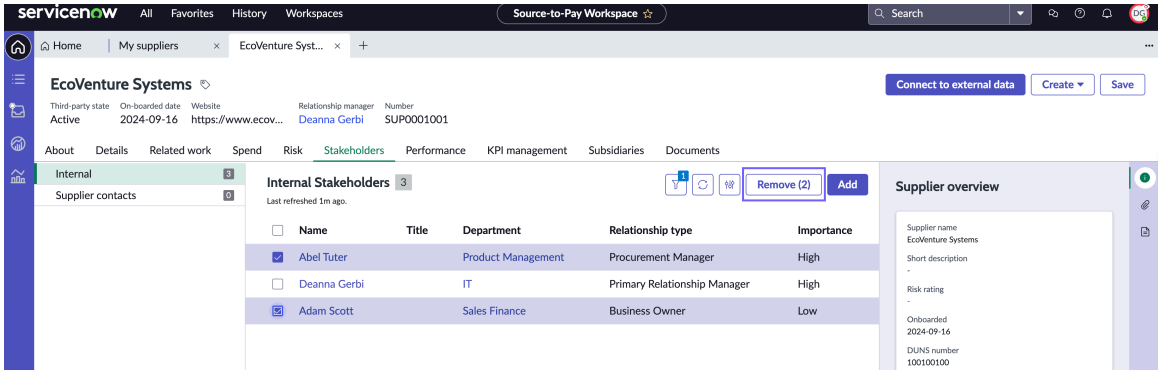
Role required: sn_slm.owner, sn_slm.manager, sn_slm.admin

> **Note:** Users with the sn_slm.owner role can remove stakeholders only for the suppliers that they manage. Users with sn_slm.manager and sn_slm.admin roles can remove stakeholders for any supplier.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick Actions, select **Manage my suppliers**.
3. Select the legal name of the supplier for which you want to add a supplier contact.
   The supplier details page is displayed.
4. Navigate to the **Stakeholders** tab, and then select **Internal**.
5. Select the required stakeholders.
6. Select **Remove**.

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7. In the Remove internal stakeholders dialog box, select **Remove**.

Result

Selected stakeholders are removed from the list of internal stakeholders.

Manage supplier contacts from the Source-to-Pay Workspace

Add or remove supplier contacts, elevate access or remove elevated access to contacts from the Source-to-Pay Workspace.

Related topics

Add a supplier contact from the Source-to-Pay Workspace

Remove a supplier contact from the Source-to-Pay Workspace

Elevate a contact to the primary contact role from the Source-to-Pay Workspace

Restrict the primary contact role for a contact from the Source-to-Pay Workspace

Add a supplier contact from the Source-to-Pay Workspace

Add 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, sn_slm.manager, sn_slm.admin

Note: Users with the sn_slm.owner role can add contacts only for the suppliers that they manage. Users with sn_slm.manager and sn_slm.admin roles can add supplier contacts for any supplier.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.

2. Under **Quick Actions**, select **Manage my suppliers**.

3. Select the legal name of the supplier for which you want to add a supplier contact.
The supplier details page is displayed.

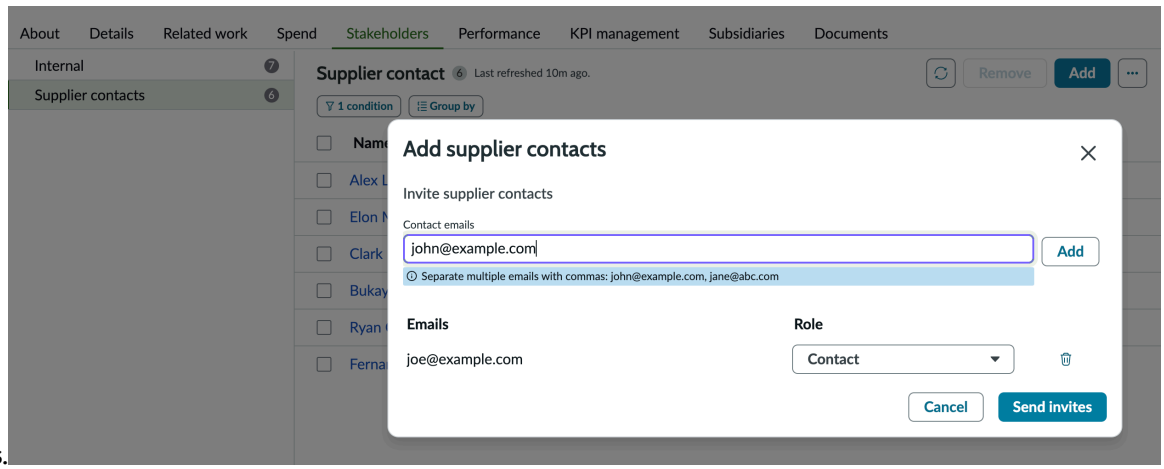
4. Navigate to the **Stakeholders** tab, and then select **Supplier contacts**.

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5. Select **Add**.

   Note: The **Add** button is visible only after the external user configuration is completed.

6. 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.
7. Select **Add**.
8. From the **Role** drop down list, select one of the following options:
   - **Contact**: Supplier contact role is assigned to the selected user.
   - **Primary**: Primary contact role is assigned to the selected user.
9. Select **Send invites**.



A confirmation message stating that an email containing the registration link is sent to the email address is displayed.

What to do next

Register to the Supplier Collaboration Portal as an invited member.

Related topics

Remove a supplier contact from the Source-to-Pay Workspace

Elevate a contact to the primary contact role from the Source-to-Pay Workspace

Restrict the primary contact role for a contact from the Source-to-Pay Workspace

Remove a supplier contact from the Source-to-Pay Workspace

Remove non-essential supplier contacts for a supplier from the Source-to-Pay Workspace.

Before you begin

Role required: sn_slm.owner, sn_slm.manager, sn_slm.admin

Note: Users with the sn_slm.owner role can remove contacts only for the suppliers that they manage. Users with sn_slm.manager and sn_slm.admin roles can remove supplier contact for any supplier.

Procedure

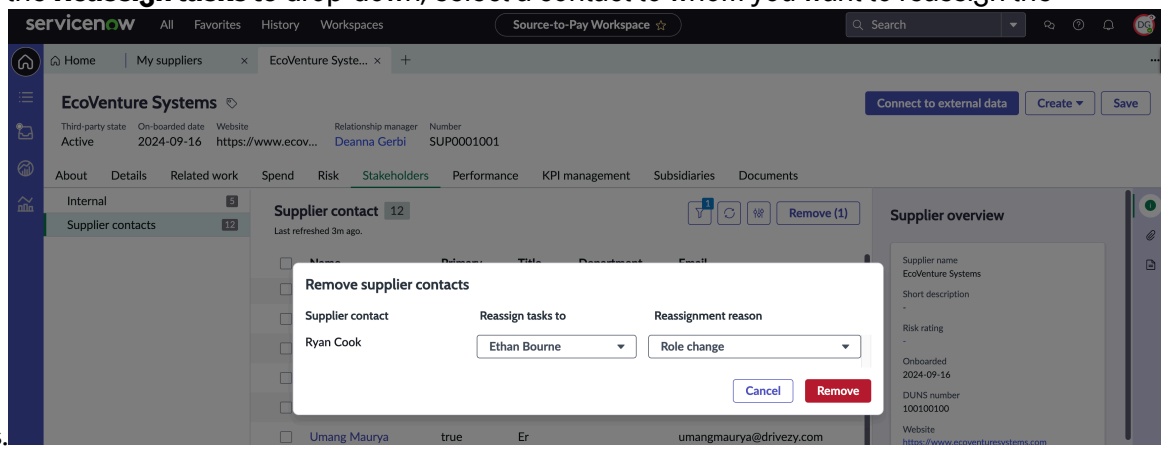
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Manage my suppliers**.
   The My suppliers page is displayed.

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3. Select the legal name of the supplier.
4. Navigate to the **Stakeholders** tab and the select **Supplier contacts**.
5. Select the supplier.
6. Select **Remove Contact**.

> **Note:** A contact can be removed only when at least two contacts exist in the supplier contact list.

7. From the **Reassign tasks to** drop-down, select a contact to whom you want to reassign the tasks.



8. From the **Reassignment reason** drop-down, select the reason for reassignment.
9. Select **Remove**.

Result

The contact is removed and all the tasks that were assigned to that contact are reassigned to the alternate contact.

Related topics

- Add a supplier contact from the Source-to-Pay Workspace
- Elevate a contact to the primary contact role from the Source-to-Pay Workspace
- Restrict the primary contact role for a contact from the Source-to-Pay Workspace

Elevate a contact to the primary contact role from the Source-to-Pay Workspace

Elevate a contact to the primary contact role to enable them to access and manage all the contacts and tasks in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.owner, sn_slm.manager, sn_slm.admin

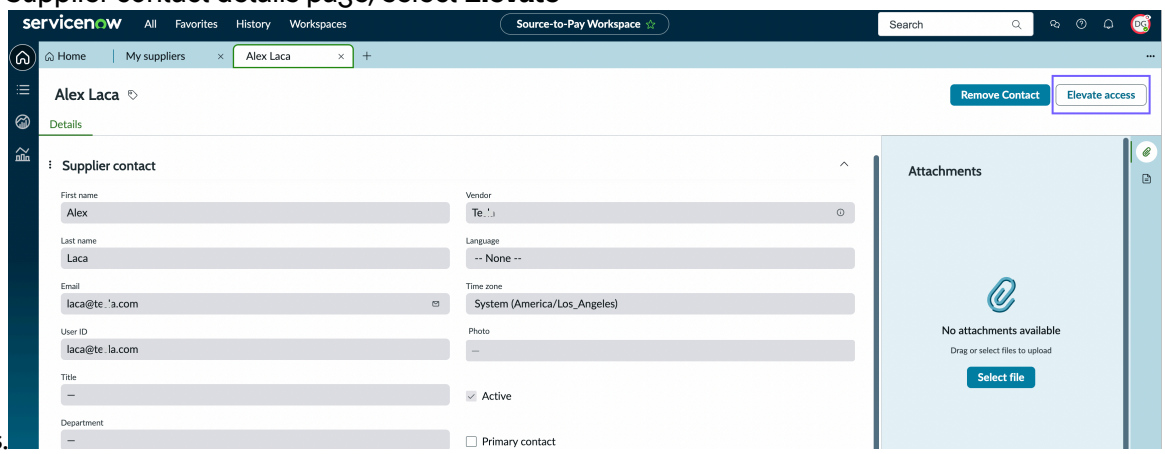
> **Note:**
>
> - Users with the sn_slm.owner role can elevate access only for the contacts of the suppliers that they manage. Users with sn_slm.manager and sn_slm.admin roles can elevate access for any supplier.
> - This functionality isn't available in Xanadu December 2024 release.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under **Quick Actions**, select **Manage my suppliers**.

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3. Select the legal name of the supplier.
4. On the supplier details page, select the **Stakeholders** tab.
5. Select **Supplier contacts**.
6. Select the supplier contact.
7. On the Supplier contact details page, select **Elevate access**.



Result

The Primary contact column is set to **true** for this contact on the Supplier contacts page, and the contact is elevated to the primary contact role.

Related topics

- Add a supplier contact from the Source-to-Pay Workspace
- Remove a supplier contact from the Source-to-Pay Workspace
- Restrict the primary contact role for a contact from the Source-to-Pay Workspace

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, sn_slm.manager, sn_slm.admin

Note: Users with the sn_slm.owner role can restrict access only for the contacts of the suppliers they own. Users with sn_slm.manager and sn_slm.admin roles can restrict access for any supplier.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under **Quick Actions**, select **Manage my suppliers**.
3. Select the legal name of the supplier.
4. On the supplier details page, select the **Stakeholders** tab.
5. Select **Supplier contacts**.
6. Select the supplier contact that you want to restrict.
7. Select **Restrict access**.

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Result

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.

Related topics

- Add a supplier contact from the Source-to-Pay Workspace
- Remove a supplier contact from the Source-to-Pay Workspace
- Elevate a contact to the primary contact role from the Source-to-Pay Workspace

Manage supplier cases from the Source-to-Pay Workspace

You can create and manage supplier cases for suppliers in the Source-to-Pay Workspace.

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. 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 Use 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 View information on supplier cases. • **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.

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Case Details page options (continued)

Option	Description
	• **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**. • **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:

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Case Details page options (continued)

Option	Description
	▪ 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. 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.

Related topics

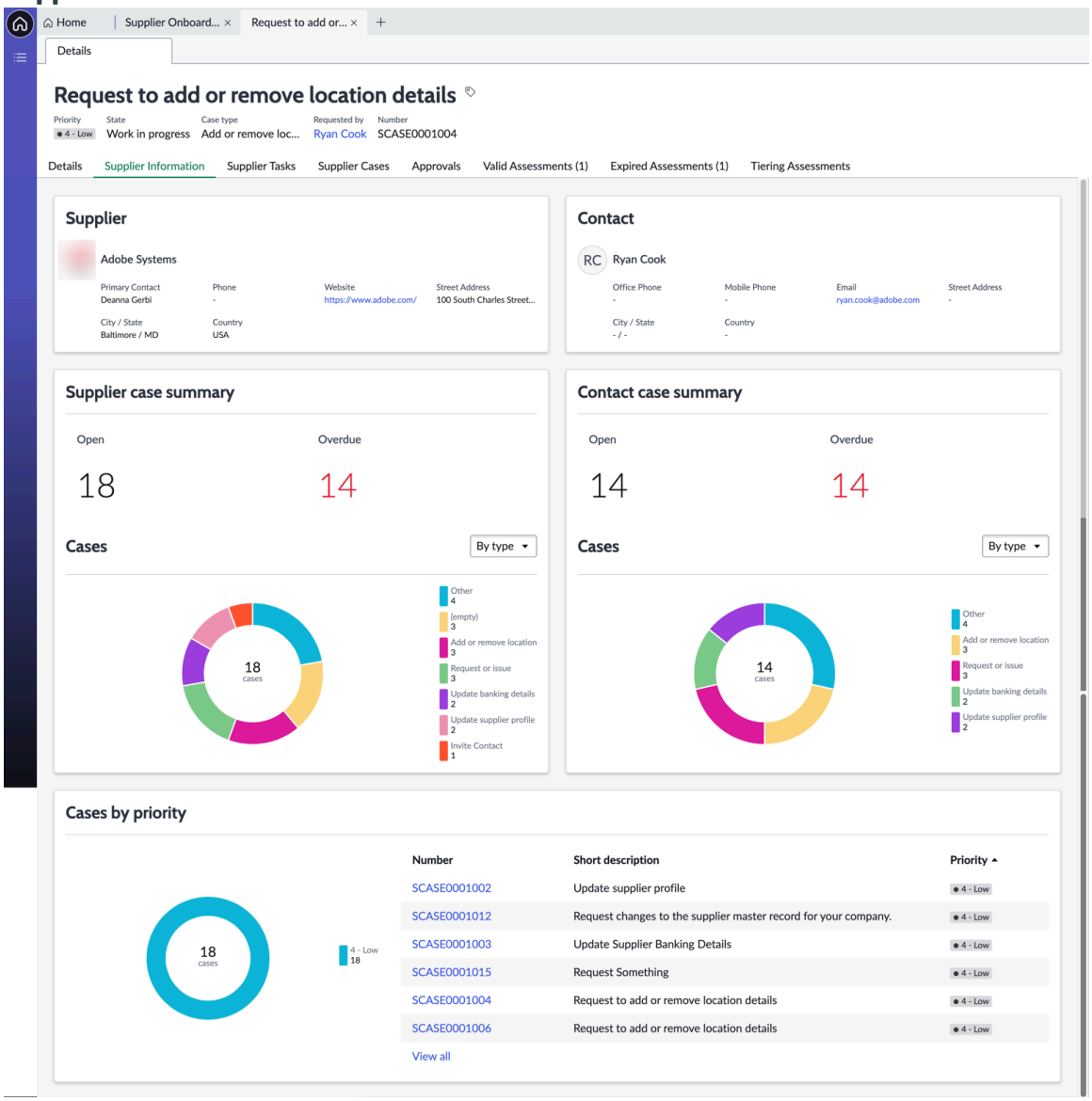
Configure due dates for supplier cases

View information on supplier cases

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.

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Supplier Information tab



Sections

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

Sections on the Supplier Information tab

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

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Sections on the Supplier Information tab (continued)

Section	Description
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.
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.

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Reports on the Supplier Information tab (continued)

Title	Type	Description
		In the Number column, select the link to the case to view more details.

Related topics

View information on supplier cases

Sidebar for supplier cases in the Source-to-Pay Workspace

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.

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.

When a supplier contact submits a request using the supplier catalog item from the Supplier Collaboration Portal or when a supplier manager or fulfiller creates a case from the Source-to-Pay Workspace, the application opens the case on the **Playbook** tab on the Details page.

The case playbook is displayed only for these case types:

- Supplier issue
- Supplier support request
- General inquiry

Case playbook flow

The following diagram illustrates the flow of the activities in each stage of the Case playbook.

Case playbook stages and activities

The case playbook contains the following stages and activities.

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Stages in 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. 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.
	Escalate task priority	The supplier manager or fulfiller can use this option only for supplier document related cases, when the following conditions are met: • case is of the type supplier issue • case has a related task and the task action is of the type Upload document • task state is Awaiting Completion. • a document reference is provided To escalate the task priority, the supplier manager or fulfiller can select a higher task priority from the Priority dropdown.
	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**.

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Related topics

- Manage supplier cases from the Source-to-Pay Workspace
- Configure due dates for supplier cases
- Playbook for updating the supplier primary data
- Create a case on behalf of a supplier from the Source-to-Pay Workspace

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. 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.

Related topics

- Manage supplier cases from 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.

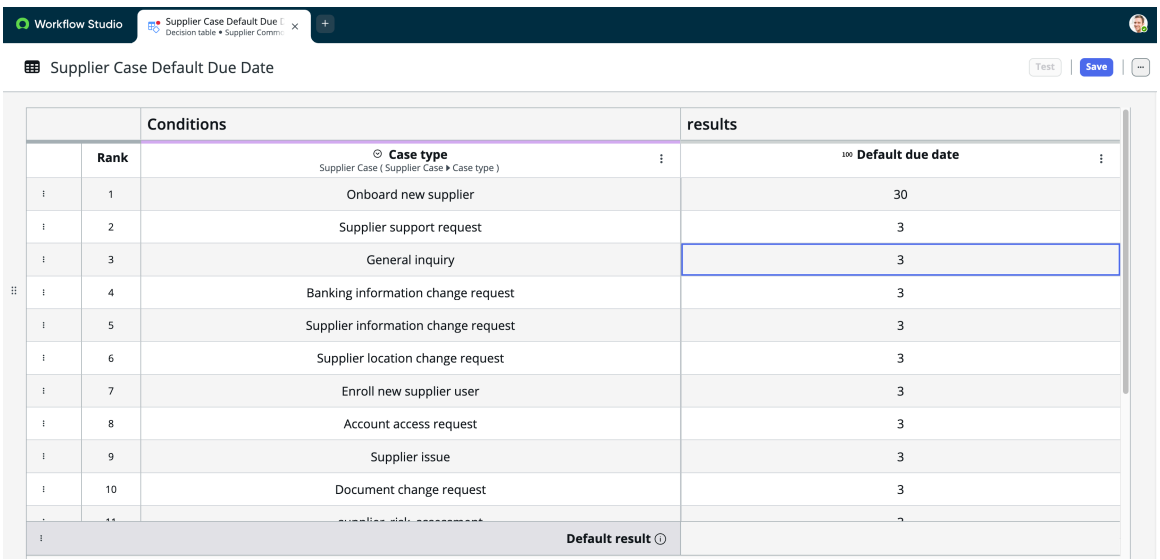
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Decision table for configuring default due dates

Case type	Default due date
Onboard new supplier	30
Supplier support request	3
General inquiry	3
Banking information change request	3
Supplier information change request	3
Supplier location change request	3
Enroll new supplier user	3
Account access request	3
Supplier issue	3
Document change request	3
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**.

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Result
The default due dates for the different case types are configured.

Related topics
- Manage supplier cases from the Source-to-Pay Workspace
- Case playbook for specific supplier case types
- Playbook for updating the supplier primary data
- Create a case on behalf of a supplier from the Source-to-Pay Workspace

Create a case on behalf of a supplier from the Source-to-Pay Workspace

Create supplier cases to track the progress of supplier tasks, resolve issues related to supplier products or services, and request additional information from the suppliers.

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.

To	Do this
To create a case from Quick actions	On the home page, do one of the following: ○ Under Quick actions, select **Create case**. ○ Under Quick actions, select **Manage my suppliers** and do the following: **a.** Select the link to the supplier name under the Legal name column. **b.** From the **Create** drop-down list, select **Supplier case**.
To create a case from the List page	**a.** Select the list icon ( ) and do one of the following: ▪ Navigate to **Lists** > **My work** > **Open cases** ▪ Navigate to **Lists** > **All work** > **Cases** **b.** Select **New**. **c.** On the Create new case dialog box, select a case type from the **Case type** field, and then select **Submit**.

3. On the Create New Supplier Case form, fill in the fields.
   For more information about the form fields and descriptions, see Fields in the Create New Supplier Case form.

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4. Select **Save**.
   The case is created in Draft state.
5. Do the following steps only if you selected these case types: **Banking information change request**, **Supplier information change request**, **Supplier location change request**, **Tax information change request**.
   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 Fields in the 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 Fields in the 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 Fields in the Add New Location form for more information about the form fields and descriptions.

   c. Select **Submit**.
6. Select **Submit case**.

Result
The case is created in 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.

Related topics
- Manage supplier cases from the Source-to-Pay Workspace
- Add a related case to a supplier case from the Source-to-Pay Workspace
- Configure due dates for supplier cases
- Case playbook for specific supplier case types
- Playbook for updating the supplier primary data
- Assign a supplier case to yourself from the Source-to-Pay Workspace
- Submit a supplier case from the Source-to-Pay Workspace

Assign a supplier case to yourself from the Source-to-Pay Workspace

Assign an open supplier case to yourself to begin working on it as supplier manager.

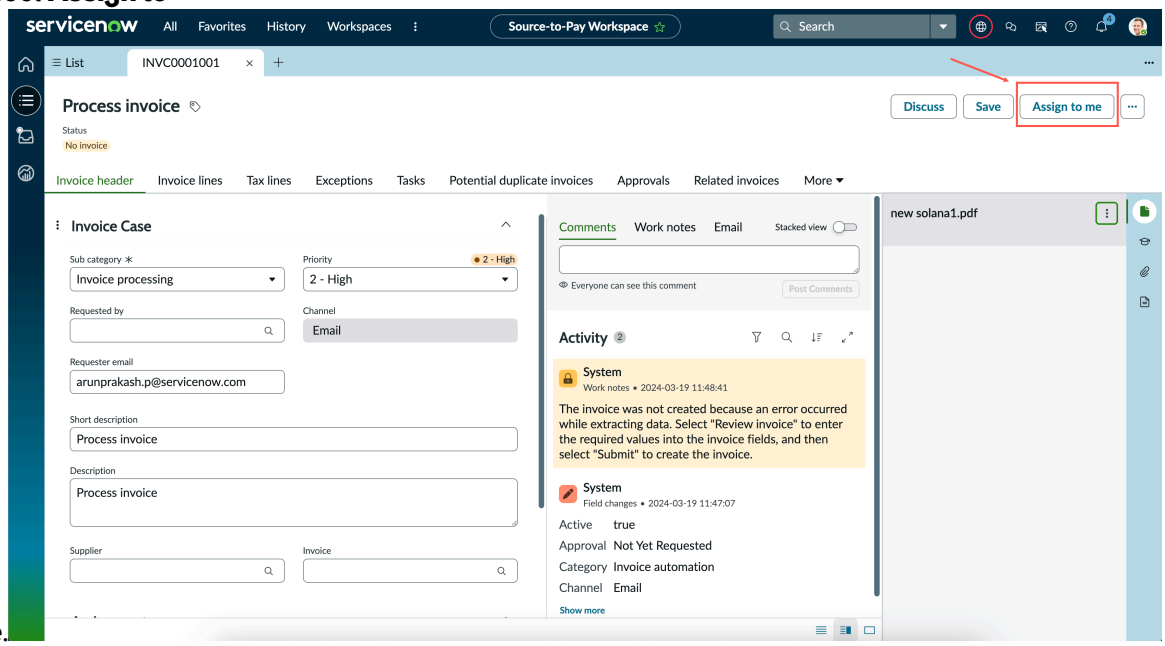
Before you begin
Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

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- 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**.



6. Select **Save**.

Result

The case is assigned to you.

Note: The **Assign to me** option is not available if a case is already assigned.

Related topics

- Manage supplier cases from the Source-to-Pay Workspace
- Add a related case to a supplier case from the Source-to-Pay Workspace
- Complete a supplier case from the Source-to-Pay Workspace
- Submit a supplier case from the Source-to-Pay Workspace

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

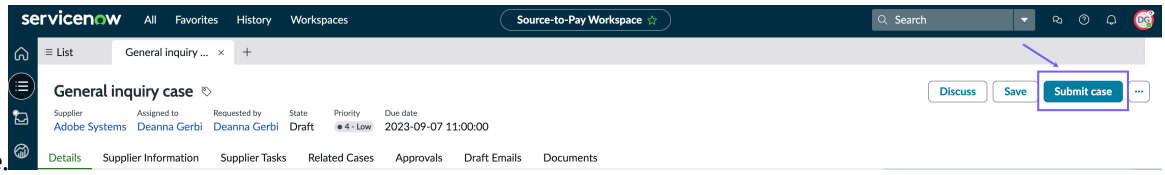
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

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**.

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4. Open a case that is in Draft state by selecting the link to the case in the Number column.
5. Select **Submit case**.



Result

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.

Related topics

- Manage supplier cases from the Source-to-Pay Workspace
- Assign a supplier case to yourself from the Source-to-Pay Workspace
- Complete a supplier case from the Source-to-Pay Workspace
- Reopen a supplier case from the Source-to-Pay Workspace

Complete a supplier case from the Source-to-Pay Workspace

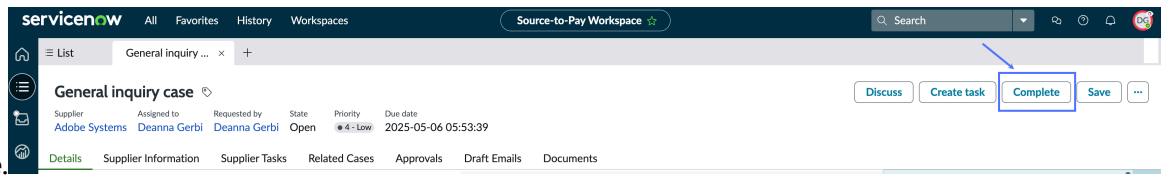
Mark a supplier case complete after finishing all associated tasks to close the case record.

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**.



6. Add closing notes to the case.

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- If the *sn.slm.isAcceptedFlowEnabled* property is enabled, the case state is changed to Awaiting acceptance and an email is sent to the supplier contact with the resolution details. Supplier contacts can accept or reject the resolution either by replying to the email or by navigating to My tasks in the Supplier Collaboration Portal.
- If the *sn.slm.isAcceptedFlowEnabled* property is not enabled, the case state is changed to closed after the addition of the closing notes.

Result

If the supplier contact accepts the resolution, the supplier case is marked as **Closed completed**. If the supplier contact rejects the resolution, the case state is changed to **Work in progress**.

Related topics

Manage supplier cases from the Source-to-Pay Workspace

Reopen a supplier case from the Source-to-Pay Workspace

Reopen a supplier case from the Source-to-Pay Workspace

Reopen a closed supplier case if you are not satisfied with the case resolution.

Before you begin

Role required: sn_slm.owner and sn_slm.agent

About this task

The **Re-open** option is available for a supplier case that is in any of the following states:

- Closed completed
- Closed canceled
- Closed rejected

The **Re-open** option is not available for the auto-closing supplier cases of the following case types:

- Onboard new supplier
- Enroll new supplier user
- Account access request
- Offboard supplier contact
- Primary contact elevation
- Request supplier contact

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Cases**.
4. Select one of the following:
   - **Open Cases**
   - **All Cases**
5. In the Number column, select the link to the case that you want to reopen.
6. Select **Re-open**.

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Result
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.

Related topics

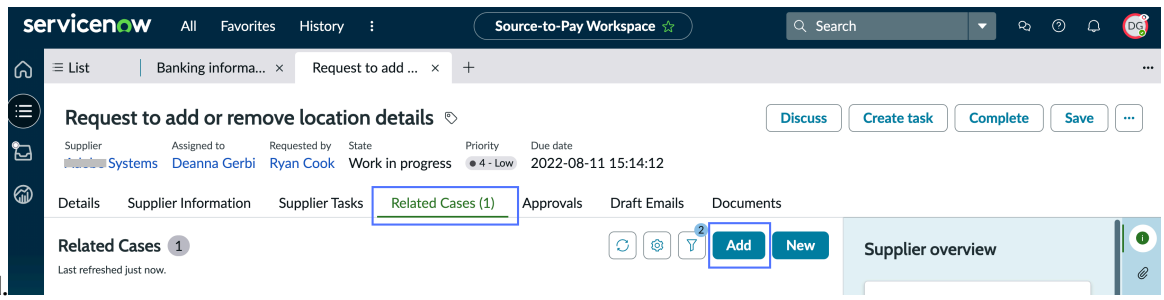
Manage supplier cases from the Source-to-Pay Workspace

Add a related case to a supplier case from the Source-to-Pay Workspace

If a supplier case has related cases, you can add them to that supplier case from the Source-to-Pay Workspace.

Before you begin
Role required: sn_slm.owner or sn_slm.admin

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. On the List page, navigate to and select a case.
4. Select the **Related Cases** tab and then select **Add**.
5. In the **Select case** field of the Add related cases dialog box, search for and select a case.
6. Select **Add**.



Result
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.

Related topics

Manage supplier cases from the Source-to-Pay Workspace

Review supplier information using Relish

Using Relish integration, checking supplier's banking details, tax information, physical addresses, and sanction screening can be done efficiently.

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Important:

- Check your entitlements to determine whether you have access to Relish integration.
- The SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) must be installed for reviewing supplier information using Relish. For more information on Relish integration, see Relish Integration for Supplier Lifecycle Operations.

The details of the following case types in the **Review supplier primary data request** playbook can be verified using Relish integration:

- Supplier location change request: For verifying updated address
- Banking information change request: For verifying banking details for bank transfers or credit card transactions
- Tax information change request: For verifying updated tax details
- Conduct sanction screening: For verifying that the supplier is not found in any sanction list

Related topics

Playbook for updating the supplier primary data

Verify supplier location change request

When a location change request is assigned to a supplier manager and they start working on it, they can verify the new location using Relish.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

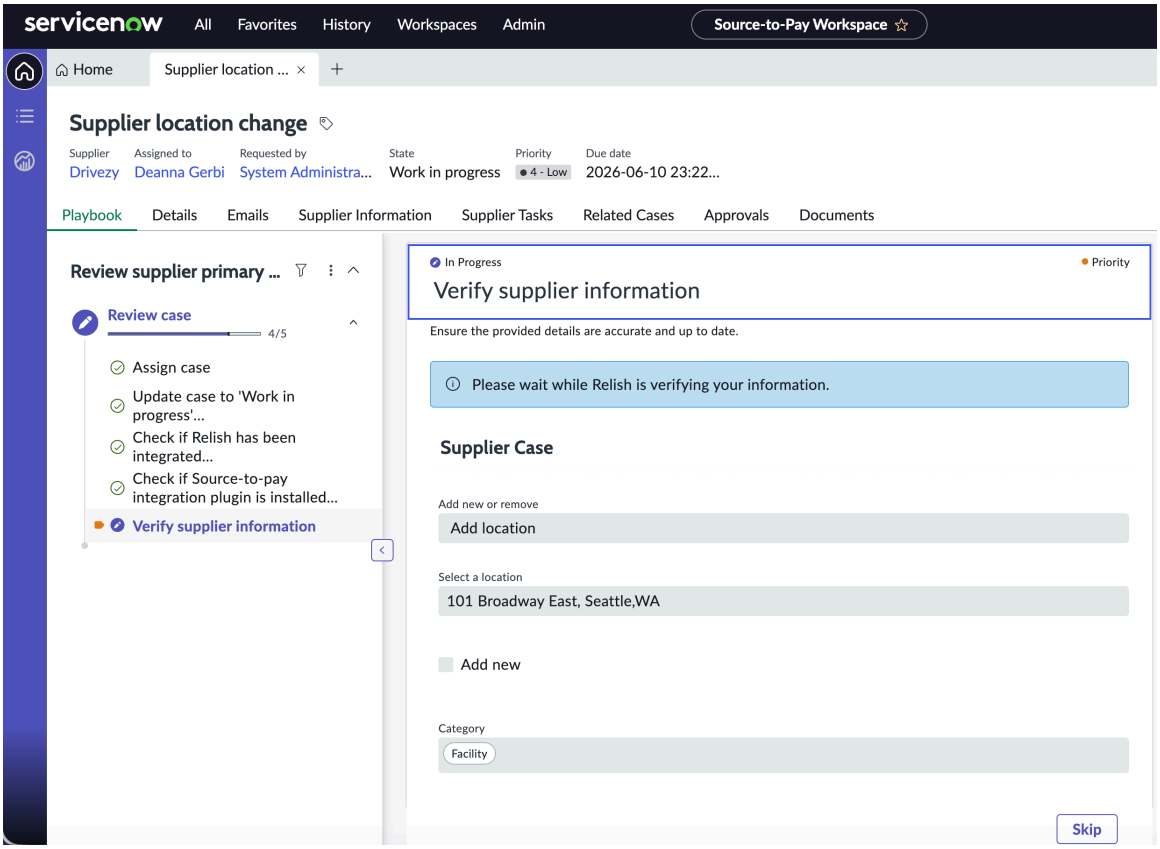
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **All work** > **Cases**.
3. Open the case for the supplier location change request which needs to be verified.
   The **Review supplier primary data request** playbook opens.
4. Select **Validate** to invoke the Relish verification process.

   It takes a few minutes for Relish to complete the verification process. Depending on the result, the supplier manager can approve or reject the request.

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For more about the parameters sent to and received from Relish, see Address verification parameters.

5. Approve or reject changes.
6. Notify the supplier by email.
7. Close the case.

Related topics

- Verify banking information
- Conduct sanction screening
- Playbook for updating the supplier primary data

Address verification parameters

Request and response parameters for location change requests sent to and received from the Relish Data Assure API.

Address validation input parameters

Parameters for address validation within location change requests.

Address input object parameters

Parameter	Required	Length	Type	Description
type	Yes	Varies	Enum	Validation type. Use `address` for location changes.

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Address input object parameters (continued)

Parameter	Required	Length	Type	Description
externalId	Yes	Varies	String	Unique identifier for this validation. Copied to output for matching.
addressLine1	Yes	1-64 characters	String	Street number and name in the first line of the address.
city	No	1-64 characters	String	City or locality name. For non-US users, this field acts as the locality.
state	Yes	32 characters	String	State or administrative area name. For non-US users, this field acts as the administrative area.
zipcode	No	16 characters	String	ZIP or postal code. For non-US users, this field acts as the postal code.
country	Yes	2-3 characters	String	ISO 3166 alpha-2 or alpha-3 country code.

Response parameters

Parameters returned in API responses for location change requests.

Transaction response parameters

Parameter	Type	Description
status	Enum	Transaction status: PENDING, PROCESSING, COMPLETED, or ERROR
result	Enum	General transaction result: PASSED, PASSED WITH CAUTIONS, FAILED, REVISION REQUIRED, or BYPASS
validationSummary	Array	Summary of results for each validation type.
validations	Array	Array of validation results processed by the API.

Related topics

- Verify supplier location change request
- Verify banking information
- Banking verification parameters
- Conduct sanction screening
- Sanction screening parameters

Verify banking information

When a banking details change request is assigned to a supplier manager and they start working on it, they can verify the details using Relish.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

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About this task

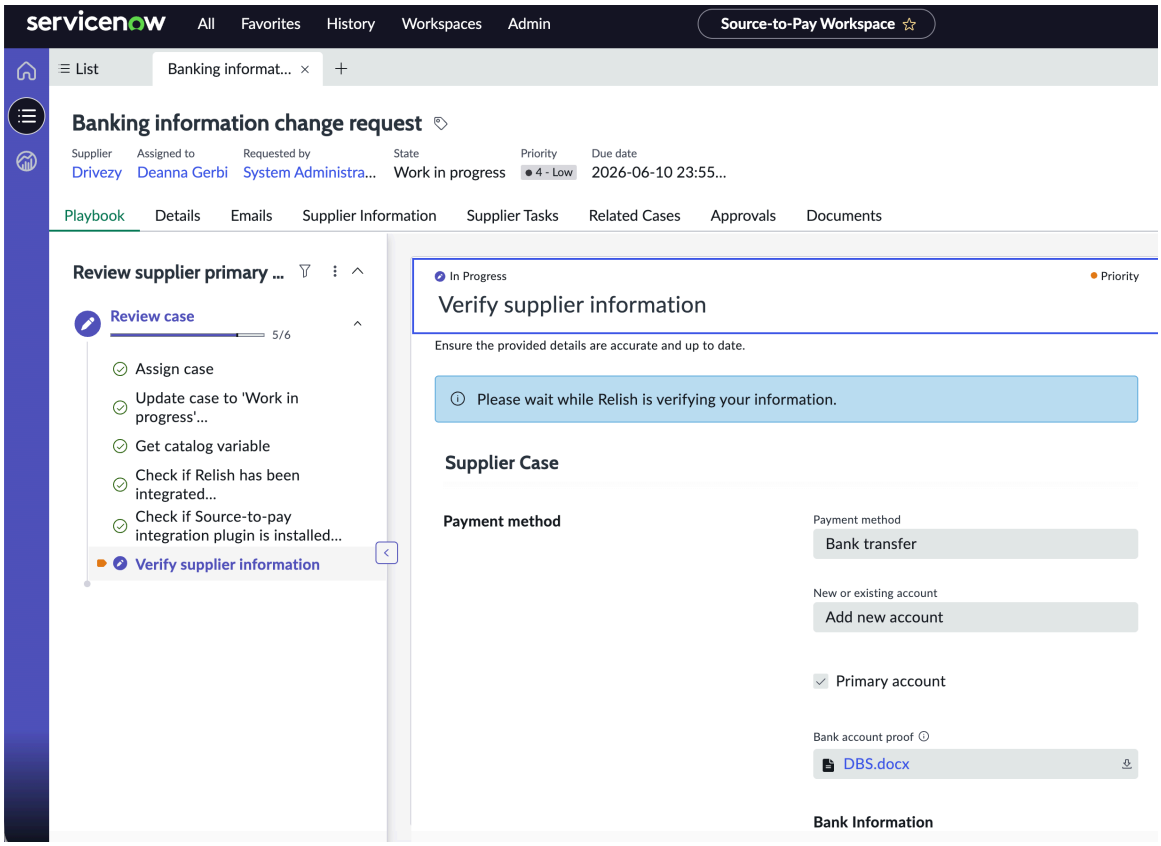
By default, bank validation checks only the bank routing number and address details. Relish also verifies the bank account number and account ownership information when bank account ownership validation is enabled.

To enable bank account ownership validation, see Enable bank account ownership validation.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **All work** > **Cases**.
3. Open the case for the banking information change request which needs to be verified. The **Review supplier primary data request** playbook opens.
4. Select **Validate** to invoke the Relish verification process.

   It takes a few minutes for Relish to complete the verification process. The validation checks bank details and, if enabled, bank account ownership. When both validations are performed, the overall result is determined by the least favorable outcome.



   For more about the parameters sent to and received from Relish, see Banking verification parameters.

5. Approve or reject changes.
6. Notify the supplier by email.
7. Close the case.

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Related topics

- Verify supplier location change request
- Conduct sanction screening
- Playbook for updating the supplier primary data

Enable bank account ownership validation

Configure the bank validation flow to include bank account ownership validation in addition to standard bank details validation.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

Role required: admin

About this task

By default, bank validation checks only the bank routing number and address details. When bank account ownership validation is enabled, Relish also verifies the bank account number and account ownership information.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the `Bank Details Validation` flow.
3. In the flow, locate the fourth step that contains the **Use Bank Information for Ownership** option.
4. Set the **Use Bank Information for Ownership** option to **Yes**.
   When set to Yes, Relish validates both bank details and bank account ownership. When set to No, Relish validates only bank routing numbers and address details.
5. Save and publish the flow.

Result

After enabling bank account ownership validation, all banking information change requests are validated for both bank details and account ownership. The overall validation result is determined by the least favorable outcome:

- If bank details validation passes and ownership validation fails, the overall result is failed
- If bank details validation passes and ownership validation passes with cautions, the overall result is passed with cautions
- If both validations pass, the overall result is passed

Related topics

- Verify banking information

Banking verification parameters

Request and response parameters for verifying banking information through the Relish Data Assure API.

Bank validation input parameters

Parameters for bank validation within the validations array.

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Bank validation input object parameters

Parameter	Required	Length	Type	Description
type	Yes	Varies	Enum	Validation type. Use `bank` for banking verification.
input	Yes	Varies	Object	Bank validation input object containing bank details.
externalId	Yes	Varies	String	Unique identifier for the bank validation. Must be unique across all validations of this type.
name	Yes	1+ characters	String	Name of the financial institution to be validated.
iban	No	1+ characters	String	International Bank Account Number (IBAN).
swiftCode	Conditional	1+ characters	String	SWIFT code associated with the account. Required if routing number is not present.
routingNumber	Conditional	Varies	String	Routing number associated with the account. Required if SWIFT code is not present.
country	Yes	2-3 characters	String	ISO 3166-1 alpha-2 or alpha-3 country code for the financial institution.

Response parameters

Parameters returned in API responses for banking verification requests.

Transaction response parameters

Parameter	Type	Description
status	Enum	Transaction status: PENDING, PROCESSING, COMPLETED, or ERROR
result	Enum	Overall transaction result: PASSED, PASSED WITH CAUTIONS, FAILED, REVISION REQUIRED, or NOT VALIDATED
validationSummary	Array	Summary of results for each validation type.
validations	Array	Array of detailed validation results.

Related topics

- Verify supplier location change request
- Address verification parameters
- Verify banking information
- Conduct sanction screening
- Sanction screening parameters

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Verify tax information

When a tax information change request is assigned to a supplier manager and they start working on it, they can verify the tax details using Relish.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

About this task

Tax information change requests can be created by supplier managers or submitted by suppliers through the supplier portal. Each supplier can have only one tax record per country.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **All work** > **Cases**.
3. Open the case for the tax information change request.
   The **Review supplier primary data request** playbook opens.
4. Select **Start work** to initiate the process.
5. If the Relish plugin is installed, select **Validate** to invoke the Relish verification process.

   It takes a few minutes for Relish to complete the verification process. The validation result appears in the case, showing one of the following statuses:

   - **Passed**: Tax information is valid
   - **Failed**: Tax information is invalid
   - **Bypass**: Country is not supported for tax validation

   If the Relish plugin is not installed, the **Approve changes** and **Reject changes** options appear directly without validation.
6. Approve or reject changes based on the validation result.
7. Select **Accept** to verify that the changes are made in other systems, if required.
8. Notify the supplier by email.
9. Close the case.

Related topics

Conduct sanction screening

Verify banking information

Update tax information using the supplier catalog

View supplier tax information

Supplier managers can view all tax information records for a supplier from the supplier record.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

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About this task

The **Tax Information** related link on the supplier record displays all tax records for the supplier. Each supplier can have only one tax record per country.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Manage Suppliers**.
2. Open the supplier record for which you want to view tax information.
3. In the Related Links section, select **Tax Information**.
   A list of all tax records for the supplier appears, showing the tax ID, tax type, and country for each record.

Conduct sanction screening

When a sanction screening request for compliance verification is assigned to a supplier manager and they start working on it, they can verify the details using Relish.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

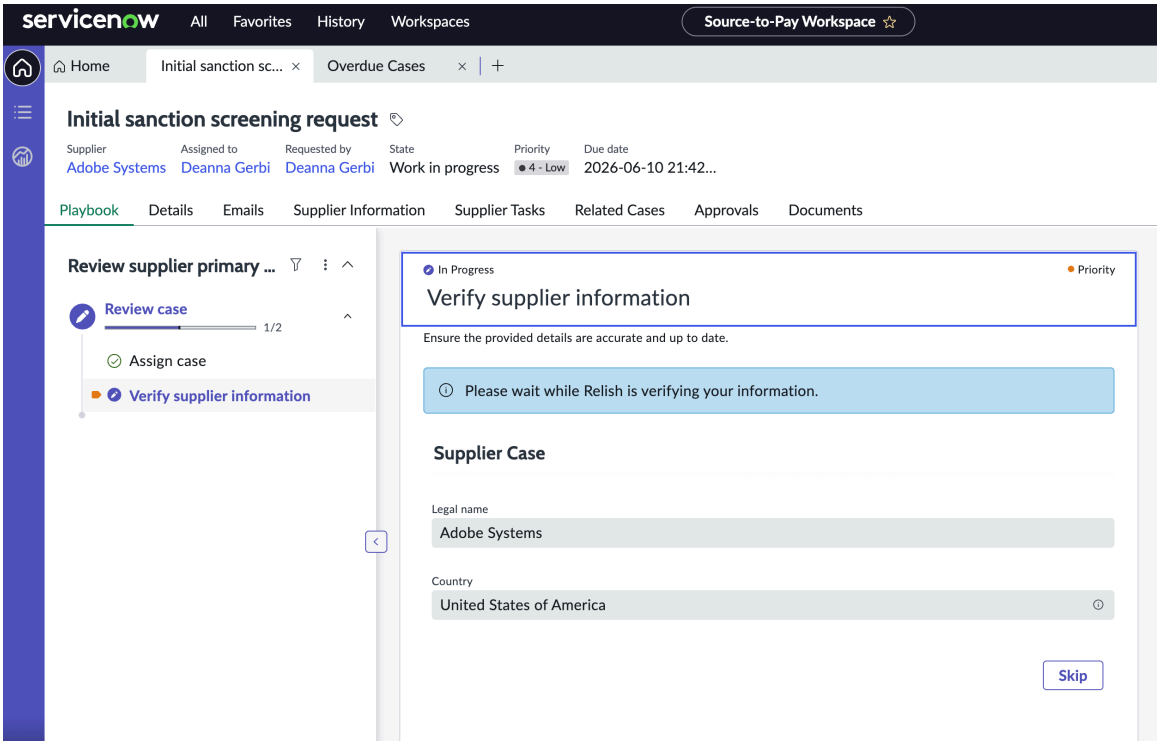
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Navigate to **Lists** > **All work** > **Cases**.
3. Open the case for sanction screening request.
   The **Review supplier primary data request** playbook opens.
4. Select **Validate** to invoke the Relish verification process.

   It takes a few minutes for Relish to complete the verification process. Depending on the result, the supplier manager can approve or reject the request.

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For more about the parameters sent to and received from Relish, see Sanction screening parameters.

Note:

- The supplier's sanction status is automatically updated in the supplier record. The status is set to **Clear** if the screening passes or passes with cautions, **Blacklisted** if it fails, or **Skipped** if it is bypassed.
- Updating the sanction status in the supplier record doesn't depend on the next step of user's approval/rejection.

5. Approve or reject changes based on the validation result.

Note: If approved, the Valid risk assessment field in the supplier record is set to True. If rejected, the Relationship status field in supplier record is set to Excluded.

6. Select **Accept** to verify that the changes are made in other systems, if required.
7. Notify the supplier by email.
8. Close the case.

Related topics

Verify supplier location change request

Verify banking information

Playbook for updating the supplier primary data

View supplier sanction status

Supplier managers can view the sanction status and last sanction check date for suppliers from the Manage Suppliers list.

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Before you begin
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

About this task
The Manage Suppliers list displays the sanction status and last sanction check date for each supplier. These fields are available regardless of whether the Relish plugin is installed.

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Manage Suppliers**.
2. Review the **Sanction status** and **Last sanction check** columns.

   The Sanction status field displays one of the following values:

   - **Clear**: Sanction screening passed or passed with cautions
   - **Blacklisted**: Sanction screening failed
   - **Skipped**: Sanction screening was bypassed or could not be completed

   The Last sanction check field displays the date and time when the most recent sanction screening was performed for the supplier.

   Note: The Sanction status and Last sanction check fields in the supplier list are updated only when Relish is integrated. If Relish is not integrated, users can edit the field manually if they want.

Related topics
Conduct bulk sanction screening

Conduct sanction screening

Sanction screening parameters
Request and response parameters for screening entities against sanction lists through the Relish Data Assure API.

Sanctions list validation input parameters
Parameters for sanctions list validation within the validations array.

Sanctions list validation input object parameters

Parameter	Required	Length	Type	Description
type	Yes	Varies	Enum	Validation type. Use `sanctionList` for sanction screening.
input	Yes	Varies	Object	Sanctions list validation input object containing entity details.
externalId	Yes	Varies	String	Unique identifier for the sanction screening. Must be unique across all validations of this type.
companyName	Conditional	1+ characters	String	Full name of the company being validated. Required if last name is not provided.
country	Yes	2-3 characters	String	ISO 3166-1 alpha-2 or alpha-3 country code. Default value is US.

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Response parameters

Parameters returned in API responses for sanction screening requests.

Transaction response parameters

Parameter	Type	Description
status	Enum	Transaction status: PENDING, PROCESSING, COMPLETED, or ERROR
result	Enum	Overall transaction result: PASSED, PASSED WITH CAUTIONS, FAILED, REVISION REQUIRED, or NOT VALIDATED
validationSummary	Array	Summary of results for each validation type.
validations	Array	Array of detailed validation results.

Related topics

- Verify supplier location change request
- Address verification parameters
- Verify banking information
- Banking verification parameters
- Conduct sanction screening

Conduct bulk sanction screening

Supplier managers can conduct sanction screening for multiple suppliers simultaneously using the bulk sanction screening feature.

Before you begin

Ensure that the SLO Connector for Relish Data Assure plugin (x_reliq_slo_connec) is installed. For more information on the required and dependent plugins for Relish, see Relish Integration for Supplier Lifecycle Operations.

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

About this task

You can check the sanction status of up to 100 suppliers at a time.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Manage Suppliers**.

   Note: The **Check sanctions** button appears on the **My suppliers** page only when the Relish plugin is installed and at least one supplier is selected.

2. Select the suppliers for which you want to conduct sanction screening.
   You can select up to 100 suppliers at a time. If you select more than 100 suppliers, an error message appears.
3. Select **Check sanctions**.
   The sanction screening process begins. This process can take several minutes depending on the number of suppliers selected.
   After the screening is complete, the Sanction status and Last sanction check date are automatically updated for each supplier.

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Result
The Sanction status field for each supplier is updated with one of the following values:

- **Clear**: Sanction screening passed or passed with cautions
- **Blacklisted**: Sanction screening failed
- **Skipped**: Sanction screening was bypassed or could not be completed

Related topics

Conduct sanction screening

Manage 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.

Related topics

Configure due dates for tasks

Create a task for a supplier case from the Source-to-Pay Workspace

Submit a task from the Source-to-Pay Workspace

Complete a supplier task from 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.

Default due dates for task types

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

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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**.

Result
The default due dates for the different task types are configured.

Related topics

Create a task for a supplier case from the Source-to-Pay Workspace

Submit a task from the Source-to-Pay Workspace

Complete a supplier task from the Source-to-Pay Workspace

Create a task for a supplier case from the Source-to-Pay Workspace

You can create a task for a supplier case and assign it to a supplier contact.

Before you begin
Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

Note: The sn_slm.owner role can create tasks only for the suppliers they own.

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Do one of the following.

To	Do this
Create a supplier task from Quick actions	On the home page, do one of the following: ○ Under Quick actions, select **Create task**. ○ Under Quick actions, select **Manage my suppliers** and do the following: **a.** Select the link to the supplier name under the Legal name column. **b.** From the **Create** drop-down list, select **Supplier task**.
Create a supplier task from the List page	**a.** Select the list icon ( ) and do one of the following: ▪ Navigate to **Lists** > **My work** > **Open tasks** ▪ Navigate to **Lists** > **All work** > **Supplier tasks**

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To	Do this
	▪ Navigate to **Lists** > **All work** > **Employee tasks** ▪ Navigate to **Lists** > **Review needed** > **Unassigned tasks** **b.** Select **New**. **c.** In the Create new task dialog box, in the **Task type** field, select **Supplier Task**.
Create a supplier task from the Case details page	**a.** Select the list icon ( ) and do one of the following: ▪ Navigate to **Lists** > **My work** > **Open cases** ▪ Navigate to **Lists** > **All work** > **Cases** **b.** In the Number column, select the link to the case that you want to create a task for, and do one of the following: ▪ Select **Create task**. ▪ Select the **Supplier Tasks** tab and then select **New**.

3. In the Create new task dialog box, do one of the following:

Actions performed in Create new task

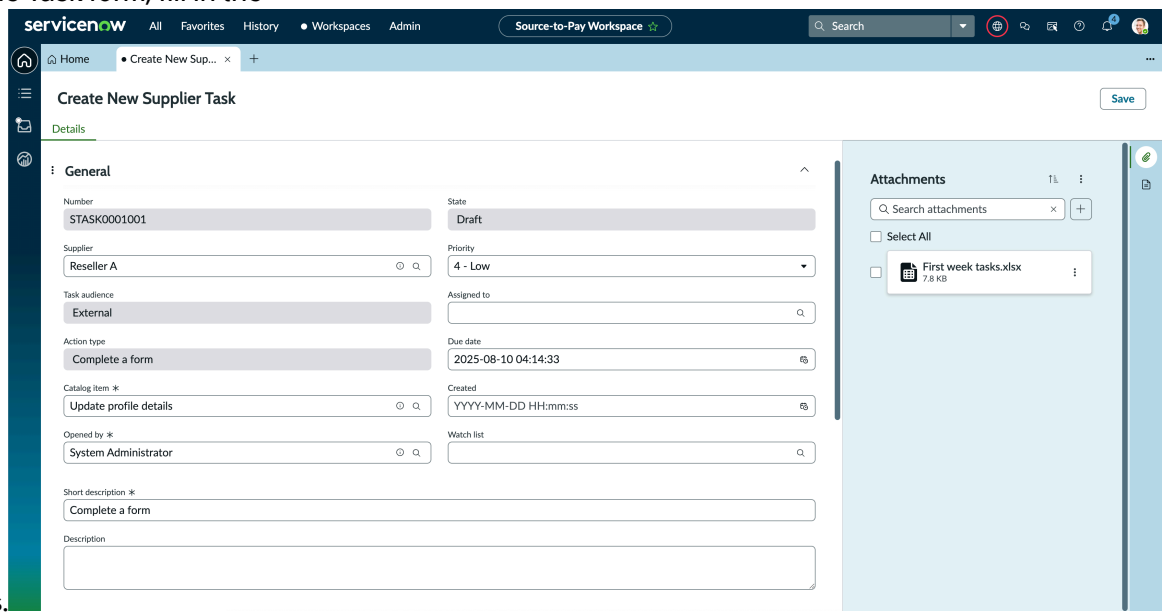
To	Do this
Create a task for a supplier	**a.** In the *Who is this task for?* section, select **Supplier**. **b.** In the **Action type** field, select one of the following task types: ▪ Complete a form ▪ Complete checklist ▪ Complete survey ▪ Mark complete ▪ Play video ▪ Sign document ▪ Upload documents ▪ 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

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To	Do this
	▪ Upload documents ▪ View link

For more information about the form fields and descriptions on the Create a new task form, see Fields in the 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.

Result

The task is created and assigned to the supplier contact.

An email notification is triggered to the assigned stakeholder. They can complete the task directly from the email or view it in the Supplier Collaboration Portal.

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.

Related topics

Configure due dates for tasks

Submit a task from the Source-to-Pay Workspace

Complete a supplier task from the Source-to-Pay Workspace

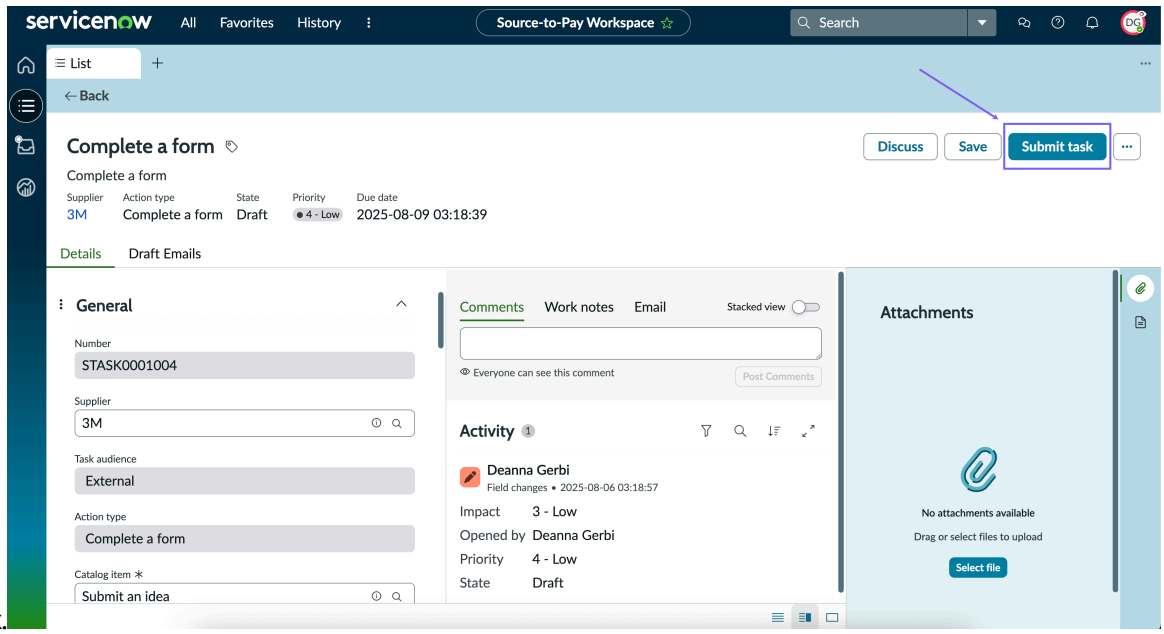
Submit a task from the Source-to-Pay Workspace

Submit a task in Draft state to indicate that it is ready to be worked on.

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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.
5. Select **Submit task**.



Result
The state of the task updates to **Awaiting completion**, indicating that the task is ready to be worked on.

Related topics
- Configure due dates for tasks
- Create a task for a supplier case from the Source-to-Pay Workspace
- Complete a supplier task from the Source-to-Pay Workspace

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.

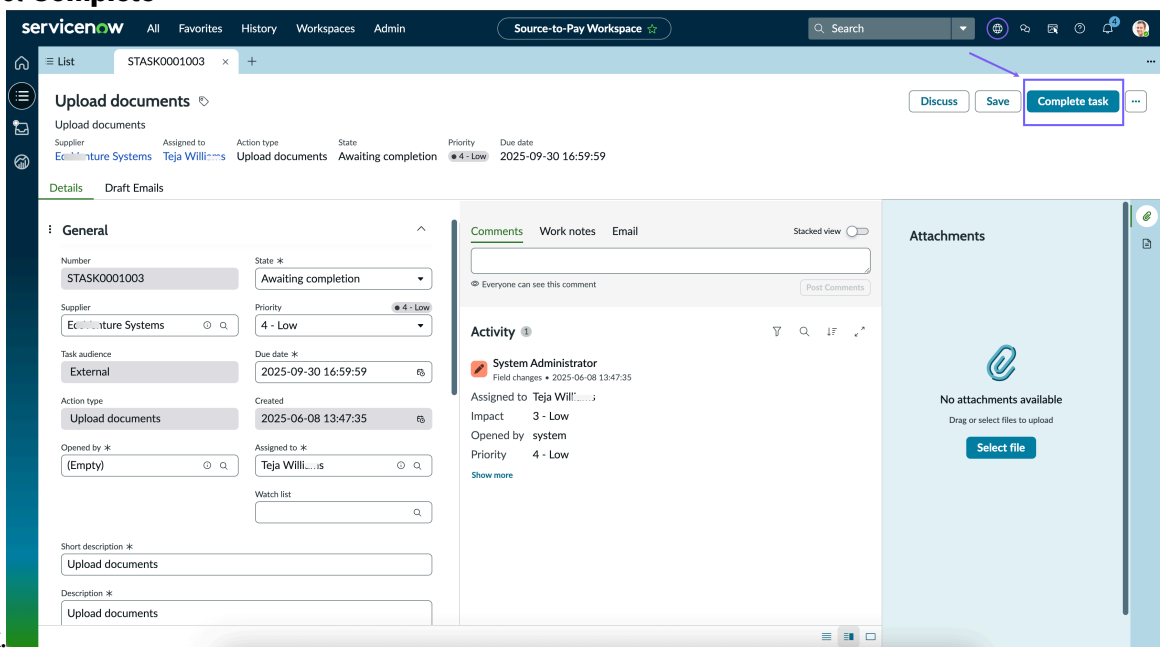
Before you begin
Role required: sn_slm.fulfiller, sn_slm.owner, or sn_slm.admin

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

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- 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**.



Result

The state of the task updates to **Closed complete**.

Related topics

Configure due dates for tasks

Create a task for a supplier case from the Source-to-Pay Workspace

Submit a task from the Source-to-Pay Workspace

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

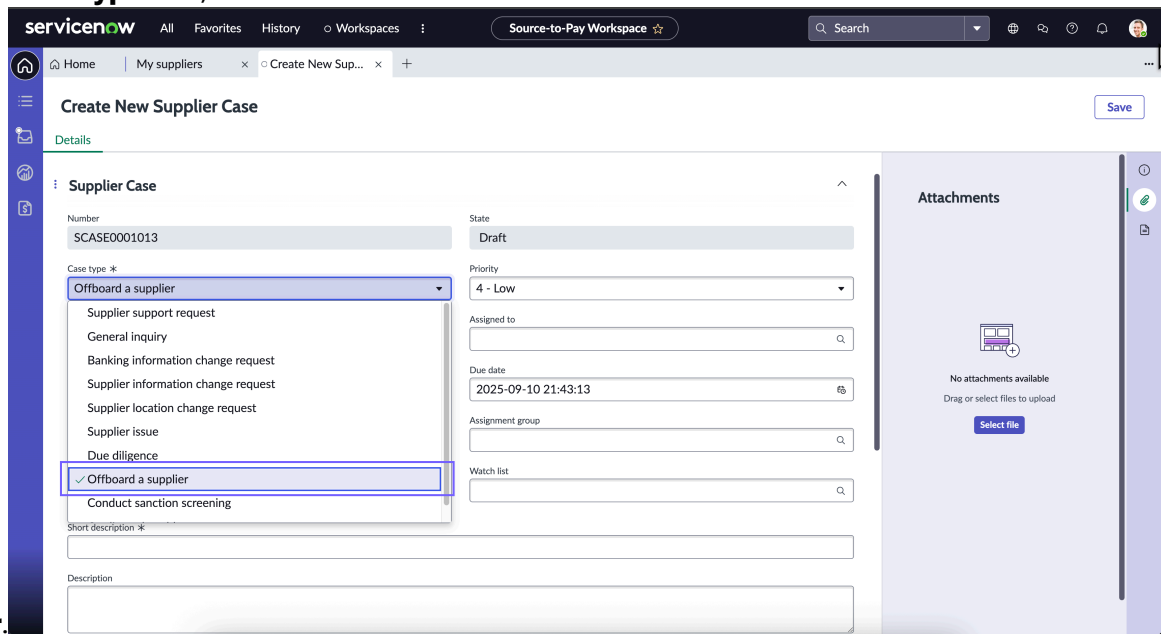
Note: The sn_slm.owner role can offboard only the suppliers they own.

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 Fields in the Create New Supplier Case form.

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4. From the **Case type** field, **Offboard a supplier**.



5. Select **Save**.
6. Select **Submit Case**.

Result

A case of type **Offboard a supplier** is created.

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.

Related topics

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.

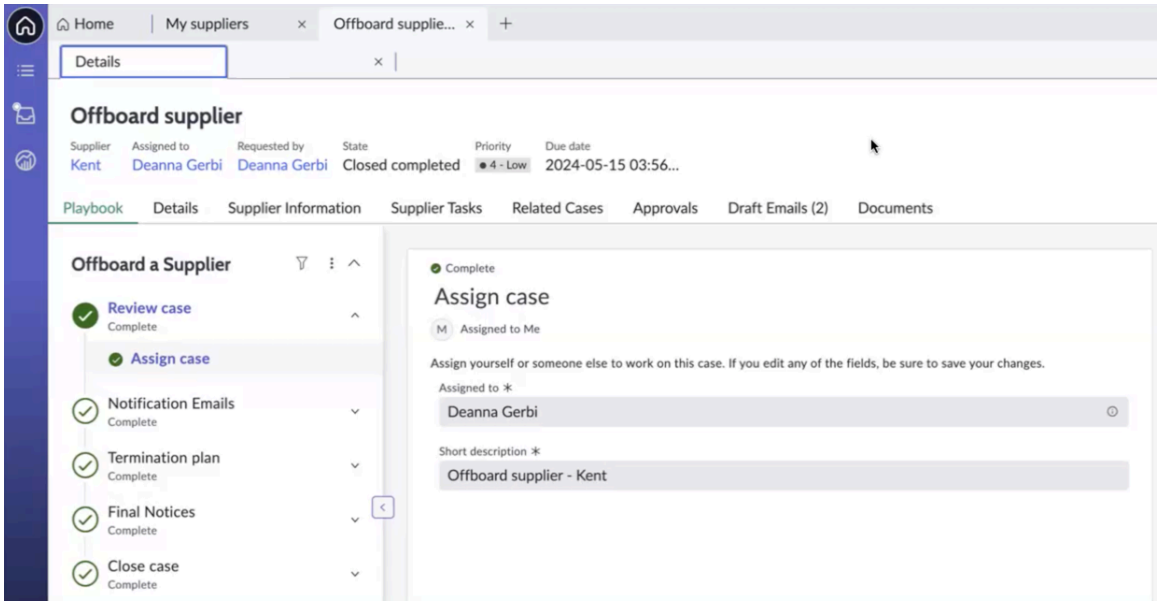
Offboard a Supplier playbook

The Offboard a Supplier playbook 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 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:

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
		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.
	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.

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
		• 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. ○ 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.

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
	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.
	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**.

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
		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.

Related topics

Offboard a supplier from the Source-to-Pay Workspace

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 View information on supplier cases.
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.

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5. From the Active Chat panel, interact with the contact who initiated the chat through the **Public Chat** tab or chat with another user for any information related to the current chat queries through the **Private Chat** tab.
   From the Agent Chat panel, do the following:
   - To chat, enter a message and select the send icon ( ).
   - To send an attachment, select the send attachment to chat icon ( ), select the file to attach, and select Open.
   - To transfer the chat to another available agent, select the transfer to agent icon ( ) and select the agent name.
6. Perform additional tasks by selecting the following UI actions:

UI actions chat panel

UI action	Description
Create Supplier Case	Creates a new supplier case. For more information, see Fields in the 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.

Result

The incoming chat request from the Supplier Manager Workspace Inbox is accepted and a chat session with the supplier contact is initiated.

Related topics

Using Source-to-Pay Workspace

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.

Related topics

View or create an interaction for a supplier

Associate an interaction record to a supplier case

View or create an interaction for a supplier

Manually create interaction records in Source-to-Pay Workspace when automatic chat initiation does not occur and link it to a case or task 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.

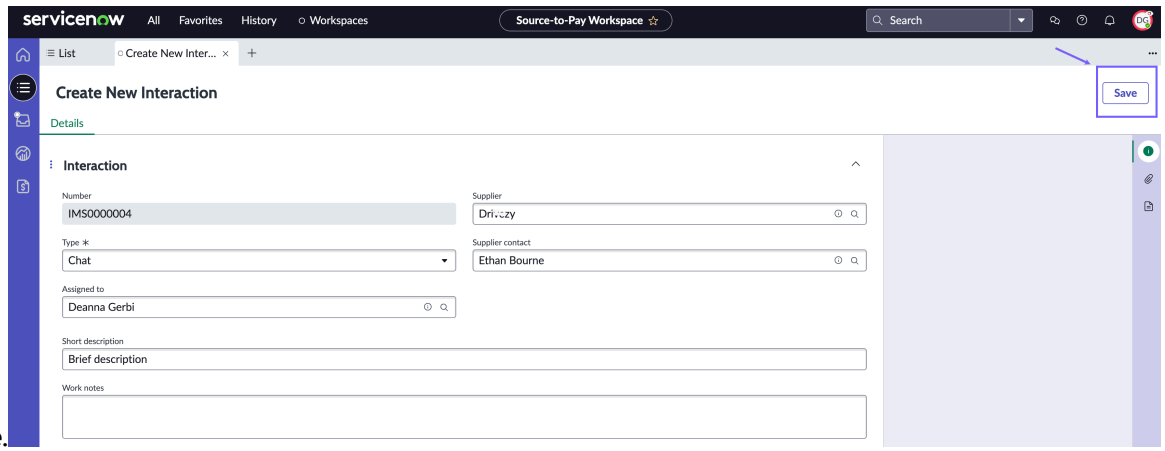
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3. Navigate to **All work** > **Interactions**
4. Select **New**.
5. On the form, fill in the fields.

Create New Interaction form

Field	Description
Number	System-generated, unique interaction number.
Type	Type of channel used for communication. ○ 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**.



Result

The interaction record is created and linked to an existing supplier case or task, which needs a supplier manager's involvement for investigation.

Related topics

Interaction Management in Supplier Lifecycle Operations

Associate an interaction record to a supplier case

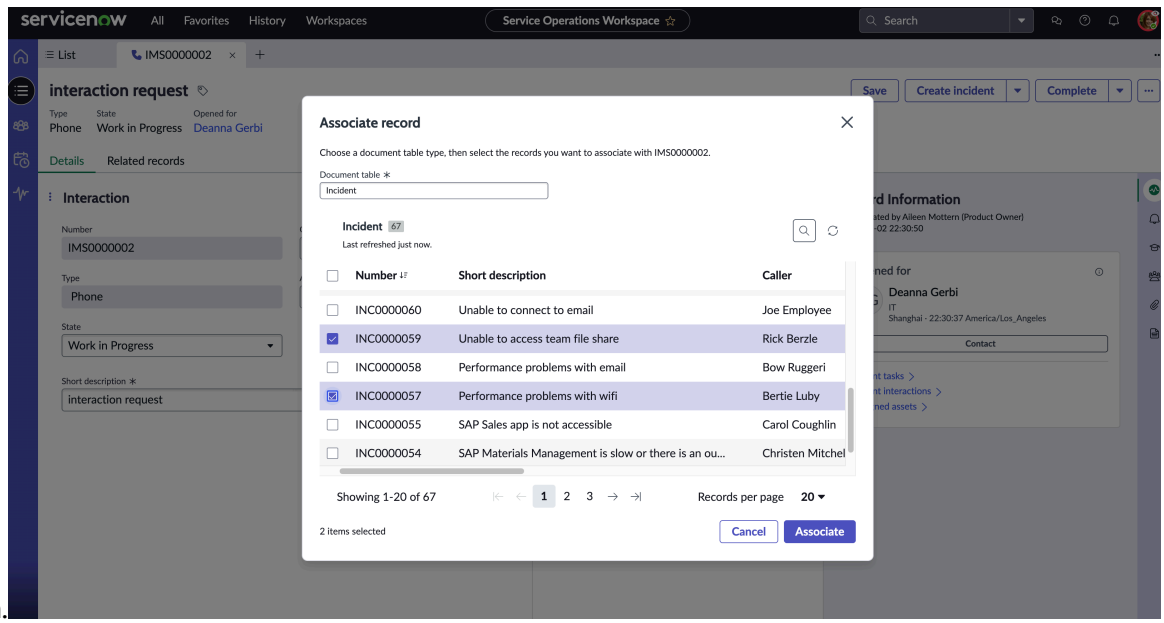
Associate an interaction record to a supplier case

Associate an interaction record to a supplier case if your interaction is related to an existing supplier case in Source-to-Pay Workspace.

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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**.

Result
The interaction record is linked to the supplier case.

Related topics
- Interaction Management in Supplier Lifecycle Operations
- View or create an interaction for a 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 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.

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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.

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.

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Related topics

Configure access to the compose email feature

Communicate using emails from the Source-to-Pay Workspace

Configure access to the compose email feature

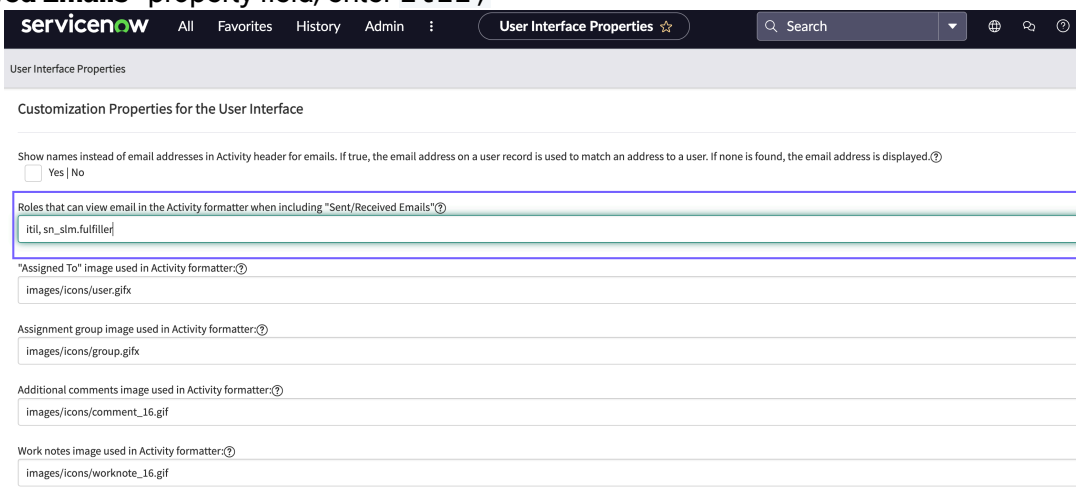
Configure the role required to access the compose email feature that enables you to send emails directly from a supplier case or supplier task in the Source-to-Pay Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. In the **Roles that can view email in the Activity formatter when including "Sent/Received Emails"** property field, enter `itil`, `sn_slm.fulfiller`.



   This property contains the `itil` role by default. Add the `sn_slm.fulfiller` role name after the `itil` role, separated by a comma.
3. Select **Save**.

Result

The role required to access the compose email feature is configured.

Related topics

Composing emails with predefined content from the Source-to-Pay Workspace

Communicate using emails from the Source-to-Pay Workspace

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: sn_slm.admin

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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.

Result

You can compose and send emails directly from a supplier case or a supplier task in the Source-to-Pay Workspace.

Related topics

Composing emails with predefined content from the Source-to-Pay Workspace

Configure access to the compose email feature

Overall supplier dashboard

The Overall supplier dashboard provides a comprehensive view of the entire supplier base's performance in one centralized location, aggregating data across all suppliers to give you enterprise-wide insights.

Important: Check your entitlements to determine whether you have access to the Overall supplier dashboard.

The Overall supplier dashboard offers the following key benefits:

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- **Holistic view**: View how the entire supplier base is performing at a glance rather than checking individual supplier dashboards.
- **Strategic filtering**: Filter by relationship status (Strategic, Tactical, Valued, Excluded), supplier, or industry to focus on specific supplier segments.
- **Actionable insights**: Identify top and bottom performers, track KPI trends, and monitor action plans across your supplier network.
- **Performance tracking**: Monitor overall supplier scores, risk levels, and spending patterns.

Using the dashboard for decision-making

To improve supplier performance:

- Identify patterns in failing KPIs and create targeted improvement initiatives.
- Focus resources on industries or relationship tiers that show consistent struggles.
- Compare top performers against bottom performers to understand success factors.

To manage risk:

- Monitor overall supplier risk ratings when applying different filters.
- Check if strategic suppliers have higher or lower risk profiles than tactical ones.
- Review action plans for suppliers with elevated risk levels.

Related topics

View Overall supplier dashboard

View Overall supplier dashboard

You can view the Overall supplier dashboard to get the enterprise-wide insights for the entire suppliers base.

Before you begin

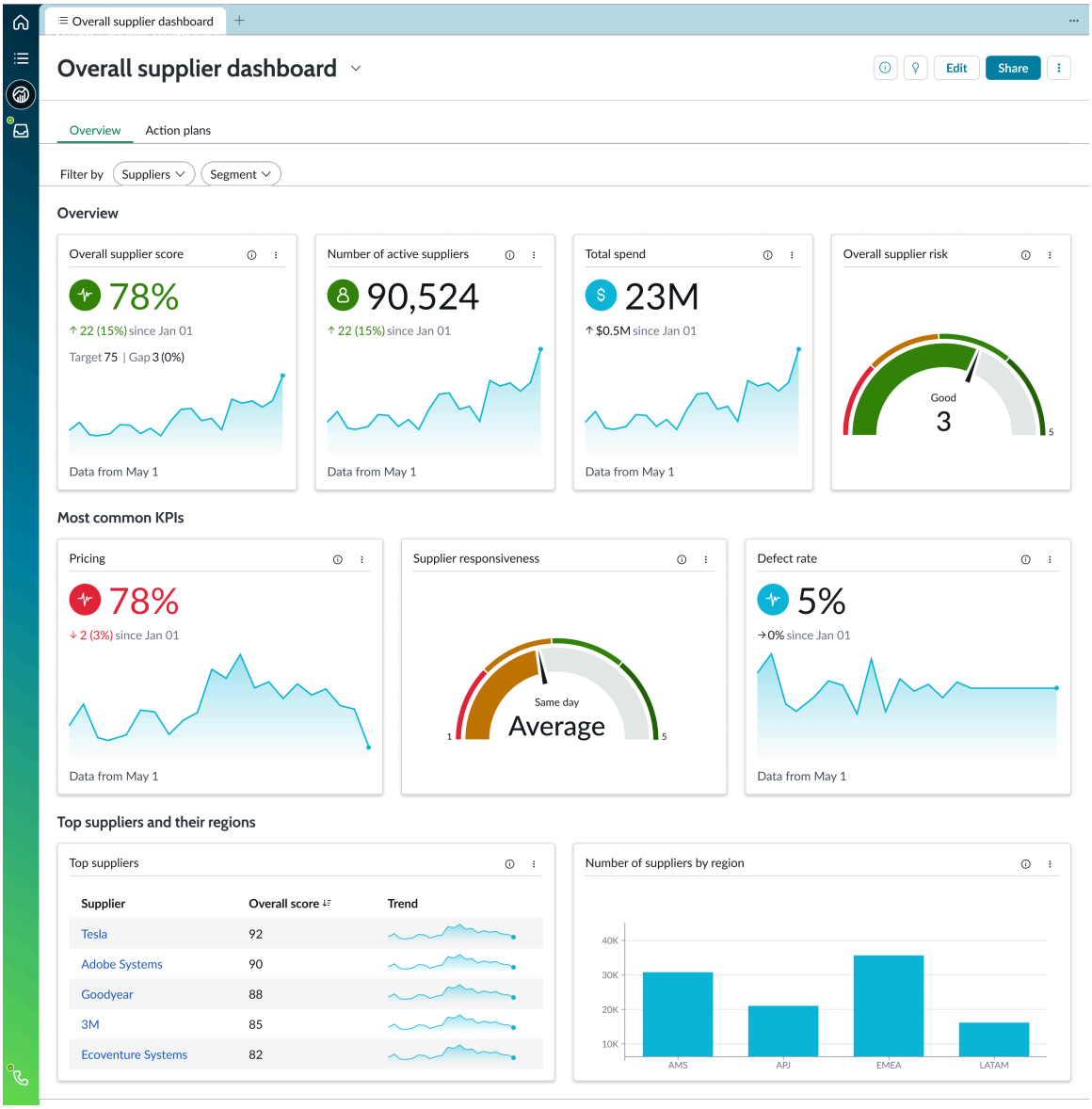
Role required: sn_slm.admin, sn_slm.supplier_manager

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the Overall supplier dashboard () icon.
   The Overall supplier dashboard with the Overview and Action plan sections is displayed.

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Overall supplier dashboard - Overview



Overview - Performance metrics (displays information based on filters)

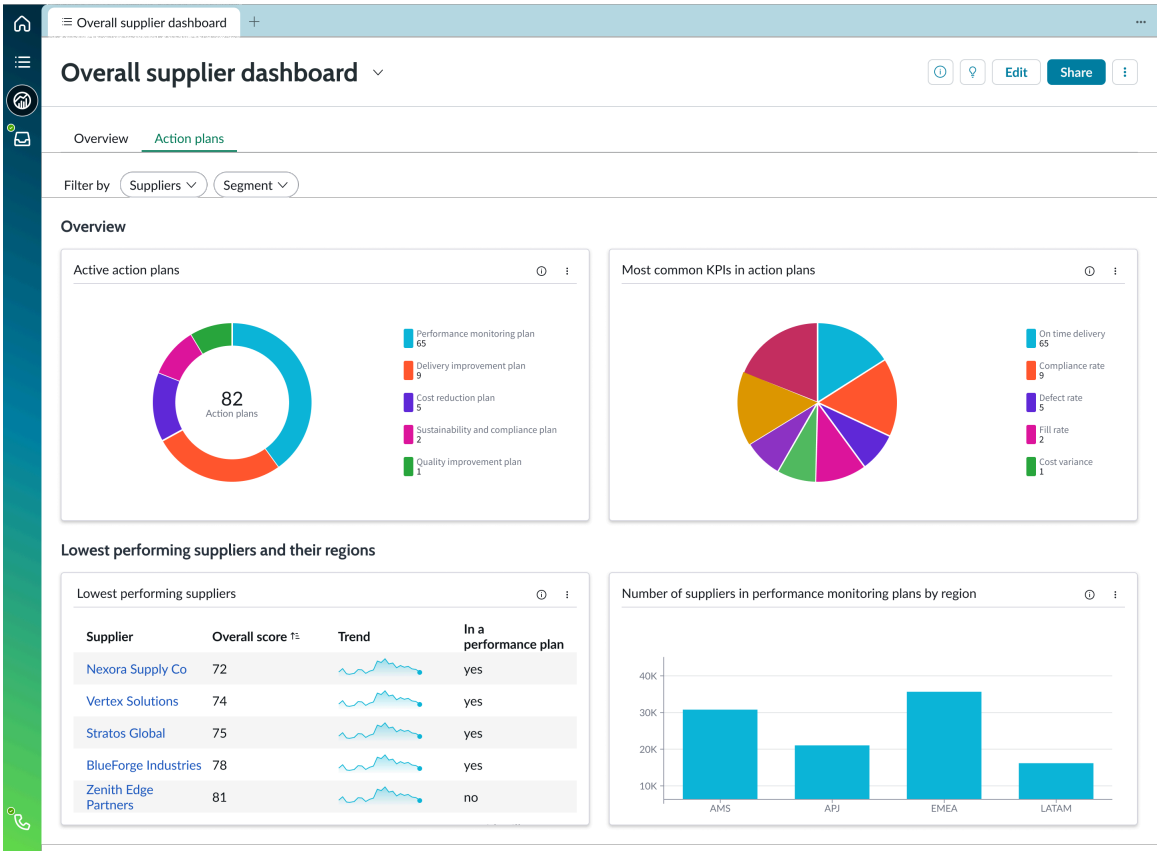
- Overall supplier score: Average of the scores of all the suppliers
- Number of active suppliers: Count of all active suppliers
- All time spend: Total amount spent from the purchase order table for active orders
- Overall supplier risk: Average of the risk ratings of all the suppliers

Overview - Supplier insights

- Supplier turnover year-to-date: Count of on-boarded and off-boarded suppliers in the current year
- KPI performance by status: Pie chart based on the choice of performance from the KPI table
- Five most common supplier KPIs: List of the most used KPIs by the suppliers
- Top five performing suppliers: List of the suppliers with the highest KPIs scores
- Top five industries by number of suppliers: Chart of the industries with the highest number of suppliers

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Overall supplier dashboard - Action plans



Action plans

- Active action plans: Chart showing active action plans grouped by plan type
- Five most common KPIs in action plans: Chart showing most common KPIs with active action plans
- Lowest five performing suppliers: List of the suppliers with the lowest KPIs scores
- Top five industries with suppliers in action plans: Chart showing industries with the maximum number of suppliers having active action plans

Related topics

Overall supplier dashboard

Create supplier case from Universal Request

Routing agents can create a supplier case from the Source-to-Pay Workspace to resolve a Universal Request.

https://player.vimeo.com/video/1191686165?h=f6c870199f&badge=0&autopause=0&player_id=0&app_id=58479%22

Before you begin

Role required: sn_uni_req.routing_agent, and sn_slm.agent

You must have the following plugin installed: Universal Request for Source-to-Pay Operations Plugin [sn_fsc_ur_common].

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Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay workspace**.
2. Select the list icon.
3. Navigate to **Universal request All**.
4. Select the Universal Request.
5. Select **Create supplier case**.
6. In the Create New Supplier Case form, fill in the details.

   The universal request number from which the supplier case is created appears in the **Universal Request** field on the supplier case form.
7. Select **Save**.
8. **Optional:** To request assistance from other departments in resolving the Universal Request simultaneously, select **Create Associated Ticket**.
   For more information on creating associated tickets, see Create associated ticket for primary ticket of UR .

Result

The supplier case number appears in the **Primary Ticket** field of the Universal Request record. It also appears in the **Associated Tickets** list of the Universal Request record.

Emails view for supplier managers

Supplier managers can access all emails including system-triggered emails, inbound replies, and error emails from the Source-to-Pay Workspace at case, task, and supplier levels.

Supplier managers can access all emails linked with a case, task, or supplier from the **Emails** tab in the case, task, and supplier details pages respectively. Email actions are reflected, incomplete email errors are handled, and email-related activities can be summarized from the workspace.

Email sources

- System-triggered outbound notification emails (for task creation)
- Inbound replies from supplier contacts (for example, task completion email)
- Inbound replies from internal stakeholders (for example, task completion email)
- Error handling emails

Email notification to supplier stakeholders for tasks

When a task is created and assigned, the system automatically triggers an notification email to the assigned stakeholder.

- When the task is assigned to a supplier contact, the email provides the receiver with two options: complete the task directly from the email, or view the task in the Supplier Collaboration Portal.
- When the task is assigned to an internal stakeholder, the email provides the receiver with two options: complete the task directly from the email, or view the task in the Source-to-Pay Workspace.

Note: If the email subject or reference ID is modified while marking the task as complete via email, the system detects the mismatch and sends an automated error notification emails.

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Email summarization for tasks and cases

An AI summary of all emails linked to a task or case can be generated using the **Summarize** button on the **Emails** page.

The following sections are displayed:

- **Summary**: Includes number of emails, key theme, tone, and actions required.
- **Next steps**: Includes list of tasks, outstanding questions or escalations, and further updates.

To enable email summarization, set the default model for the One Extend capabilities.

1. Navigate to **Sys_One_Extend_Capability**.
2. Open the **Summarize** record.
3. In the **OneExtend Definition Configs** related list, verify that at least one model is marked as **Default** to **True**.

Note: Email summarization is not available for supplier records.

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.

Related topics

Invite a member to access the Supplier Collaboration Portal

View supplier payment information from the Supplier Collaboration Portal

View supplier locations from the Supplier Collaboration Portal

Supplier contact self-registration

Managing supplier contacts from the Supplier Collaboration Portal

Raising requests from the Supplier Collaboration Portal

Viewing supplier contact tasks from the Supplier Collaboration Portal

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:

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- 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.

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.

Related topics

Using Supplier Collaboration Portal

Register to the Supplier Collaboration Portal as an invited member

Register to the Supplier Collaboration Portal as an invited member

As an invited member, you can register and get access to the Supplier Collaboration Portal.

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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.

Supplier contact self-registration

Supplier contacts can self-register to the Supplier Collaboration Portal and start working on the assigned tasks.

Related topics

Supplier contact self-registration

Self-register to the Supplier Collaboration Portal

Supplier contact self-registration

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

In this workflow:

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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.

Related topics

Approve a request associated with the Enroll a new supplier user case type from the Source-to-Pay Workspace

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**.

Result

The request associated with the **Enroll a new supplier user** case type is approved.

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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

The External user self-registration configuration must be enabled.

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.

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.

Related topics

Using Supplier Collaboration Portal

Supplier contact self-registration

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.

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Related topics

- Elevate a contact to the primary contact role from the Supplier Collaboration Portal
- Restrict the primary contact role for a contact from the Supplier Collaboration Portal
- Reassign tasks to a different contact from the Supplier Collaboration Portal
- Update the supplier contact email from the Supplier Collaboration Portal
- Remove a supplier contact from the Supplier Collaboration 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**.

Result

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.

Related topics

- Managing supplier contacts from the Supplier Collaboration Portal
- Restrict the primary contact role for a contact from the Supplier Collaboration Portal
- Reassign tasks to a different contact from the Supplier Collaboration Portal
- Update the supplier contact email from the Supplier Collaboration Portal
- Remove a supplier contact from the Supplier Collaboration Portal

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.

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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. 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**.

Result

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.

Related topics

- Managing supplier contacts from the Supplier Collaboration Portal
- Elevate a contact to the primary contact role from the Supplier Collaboration Portal
- Reassign tasks to a different contact from the Supplier Collaboration Portal
- Update the supplier contact email from the Supplier Collaboration Portal
- Remove a supplier contact from the Supplier Collaboration Portal

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.

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To	Do this
Open a task from the portal header	**a.** Select one of the following: ▪ **My Tasks** The My To-dos page is displayed. ▪ **All Tasks** The Supplier Task List is displayed. **b.** Select the task that you want to reassign to a different contact.
Open a task from the My active items wid get	Select the Tasks tile, which opens the The My To-dos page.
Open a task from the My tasks widget	Select the task that you want to reassign to a different contact.

3. Select **Reassign**.
4. In the **Assign to** field, search for and select the contact that you want to reassign this task to.
5. Select **Submit**.

Result
The task is reassigned to the selected contact.

Related topics
- Managing supplier contacts from the Supplier Collaboration Portal
- Elevate a contact to the primary contact role from the Supplier Collaboration Portal
- Restrict the primary contact role for a contact from the Supplier Collaboration Portal
- Update the supplier contact email from the Supplier Collaboration Portal
- Remove a supplier contact from the Supplier Collaboration Portal

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`.

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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**.

Result
The email address of the supplier contact is updated.

Related topics
- Managing supplier contacts from the Supplier Collaboration Portal
- Elevate a contact to the primary contact role from the Supplier Collaboration Portal
- Restrict the primary contact role for a contact from the Supplier Collaboration Portal
- Reassign tasks to a different contact from the Supplier Collaboration Portal
- Remove a supplier contact from the Supplier Collaboration Portal

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:

Options to remove supplier contact from the Supplier Collaboration Portal

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.

Result
The selected supplier contact is removed.

Related topics
- Managing supplier contacts from the Supplier Collaboration Portal
- Remove a supplier contact from the My contacts widget

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**.

Result

The contact is removed and all the tasks that were assigned to that contact are reassigned to the alternate contact.

Related topics

Remove a supplier contact from the Supplier Collaboration Portal

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.

https://player.vimeo.com/video/1073916598?h=7b4717fbe3&badge=0&autopause=0&player_id=0&app_id=58479

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

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- Submit an idea
- Submit an issue
- Update banking details
- Update profile details
- Update default supplier
- Update tax information
- Something else

Related topics

Add or remove a supplier location using the supplier catalog

Add a supplier contact using the supplier catalog

Remove a supplier contact using the supplier catalog

Ask a question using the supplier catalog

Submit an idea using the supplier catalog

Submit an issue using the supplier catalog

Update banking details using the supplier catalog

Update company profile using the supplier catalog

Request elevated access

Update default supplier

Request something else using the supplier catalog

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.

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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 **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**
   - **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 Fields in the Add New Location form.
10. Select **Submit**.

Result

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.

Related topics

Raising requests from the Supplier Collaboration Portal

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.

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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. 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.
11. **Optional:** Select **Remove**.
    All the supplier contact rows are removed.
12. Select **Submit**.

Result

The application creates a case of type Enroll new supplier user and assigns it to the supplier manager to take the appropriate action.

Related topics

Raising requests from the Supplier Collaboration Portal

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.

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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 **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**.

Result

The application creates a case of type Offboard supplier contact and assigns it to the supplier manager to take the appropriate action.

Related topics

Raising requests from the Supplier Collaboration Portal

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

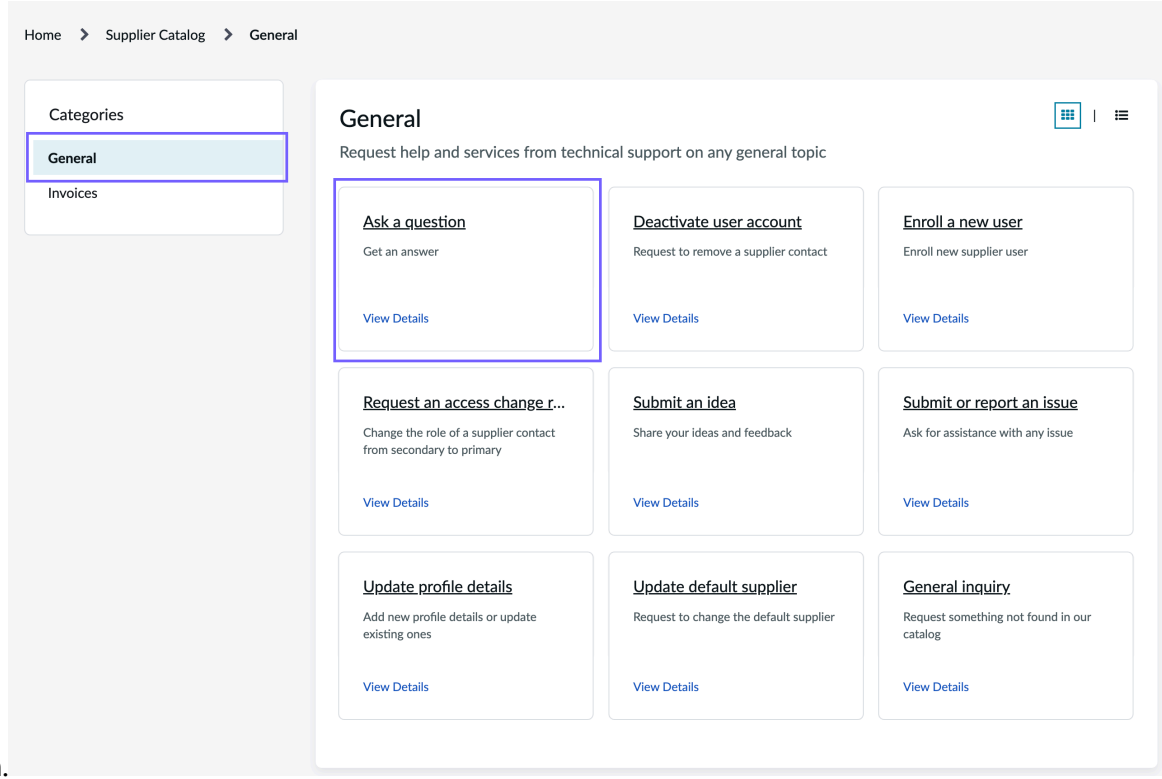
1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

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. 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**.

Result

The application creates a case of type General inquiry and assigns it to the supplier manager to take the appropriate action.

Related topics

Raising requests from the Supplier Collaboration Portal

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.

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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. 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**.

Result

The application creates a case and assigns it to the supplier manager to take appropriate action.

Related topics

Raising requests from the Supplier Collaboration Portal

Submit an issue using the supplier catalog

Submit an issue that you need help with.

Before you begin

Role required: sn_slm.contact

Procedure

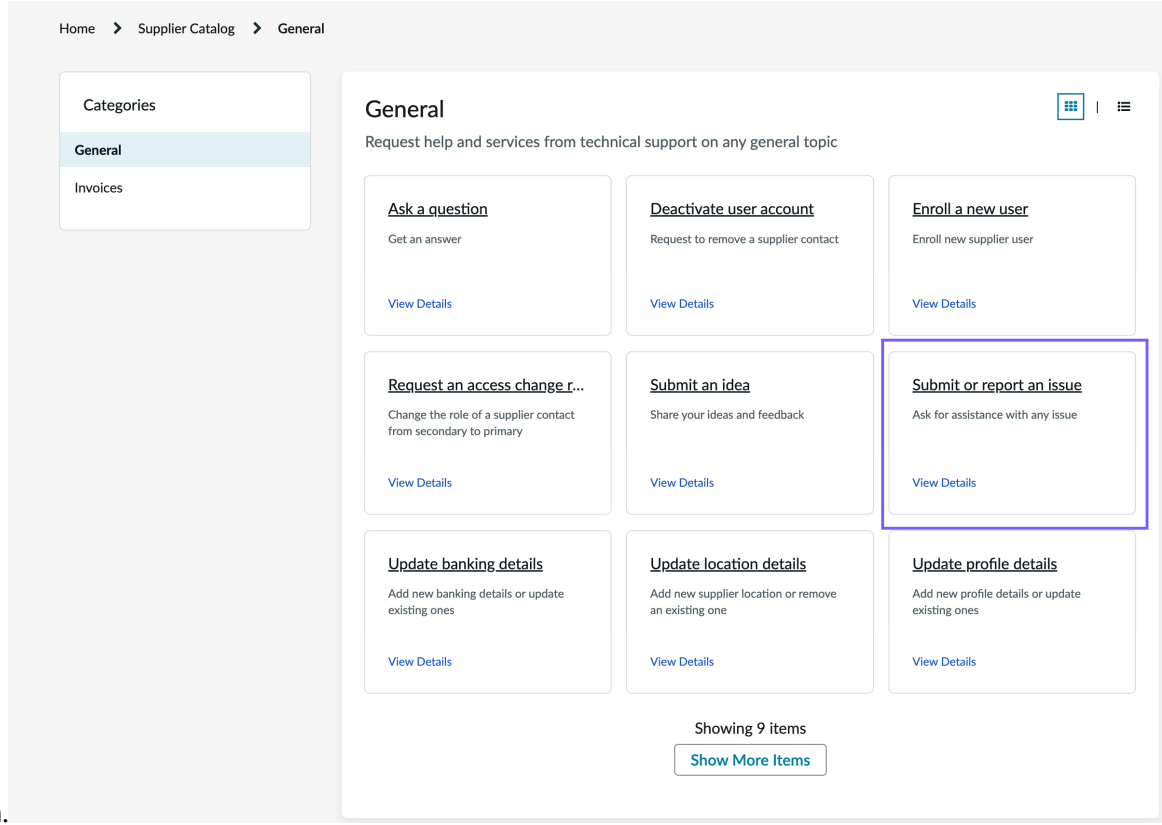
1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

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. 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**.

Result

The application creates a case and assigns it to the supplier manager to take the appropriate action.

Related topics

Raising requests from the Supplier Collaboration Portal

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

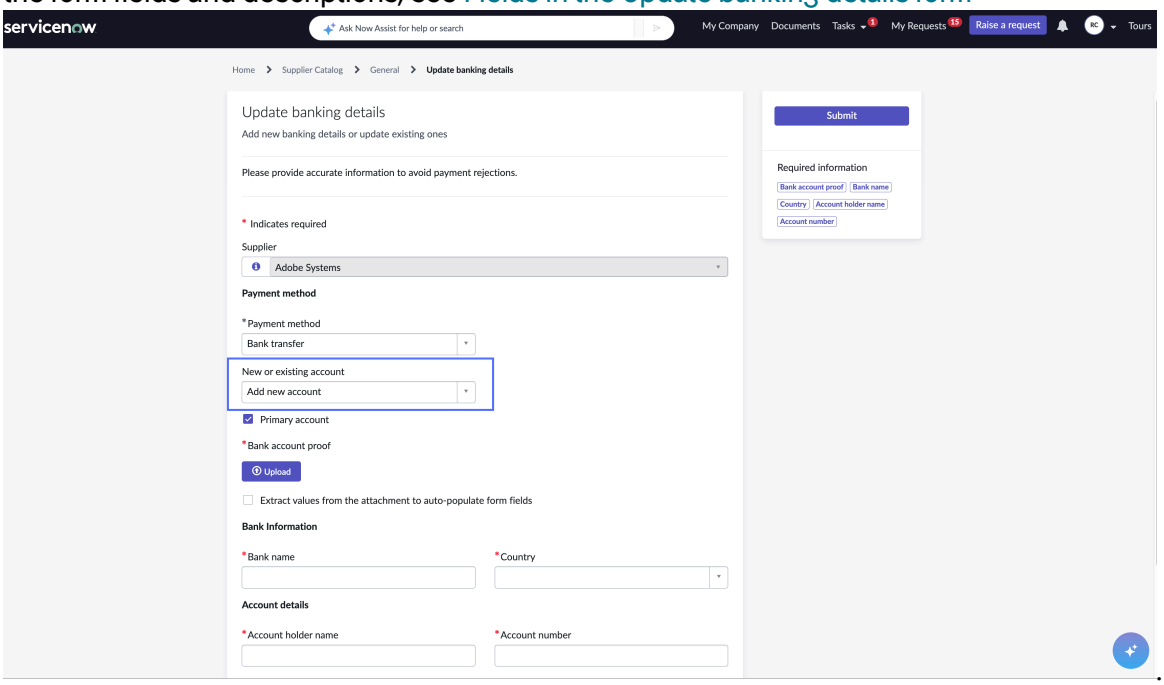
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Procedure

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. 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 **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.
   If you are adding a new account, you can auto-populate the Bank name, Account holder name, and Account number fields by selecting the **Extract values from the attachment to auto-populate from fields** checkbox. For more information about the form fields and descriptions, see Fields in the Update banking details form



6. Select **Submit**.

Result

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.

Related topics

Raising requests from the Supplier Collaboration Portal

Update company profile using the supplier catalog

Update the company profile when the details about your company change.

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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. 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 Fields in the Update profile details form.
5. Select **Submit**.

Result
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.

Related topics

Raising requests from the Supplier Collaboration Portal

Request elevated access

Submit a request to gain access to the privileges of the primary contact role.

Before you begin
Role required: sn_slm.contact

About this task
The Request elevated access catalog item is available only to the secondary contact role. A secondary contact is a user that has the Primary contact column set to **false** on the Vendor Contacts page.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. 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. 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.

Related topics

Raising requests from the Supplier Collaboration Portal

Update default supplier

Update the default supplier when multiple suppliers are linked with your profile.

Before you begin

Role required: sn_slm.contact

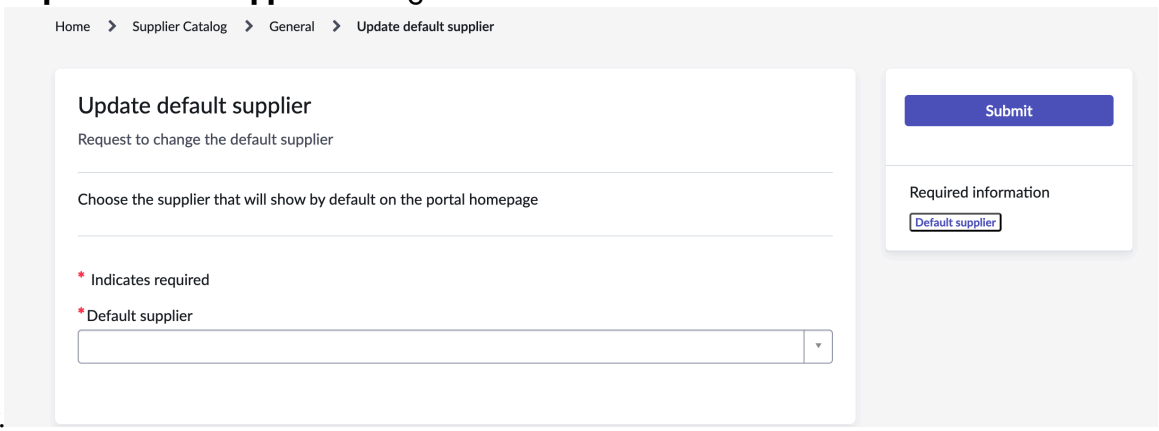
Important: This catalog request item is available from the Xanadu December 2024 release onwards, only after M2M mapping between supplier contact and suppliers is enabled and more than one suppliers are linked with your profile.

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**.

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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**.

Result
The default supplier is updated.

Related topics

Raising requests from the Supplier Collaboration Portal

Update tax information using the supplier catalog

Suppliers can submit tax information change requests through the supplier portal to update or add tax details for their organization.

Before you begin
Role required: sn_slm.contact

About this task
Suppliers can add new tax information or update existing tax details. The system validates that only one tax record exists per country for each supplier.

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 **Update tax details**.
4. To add new tax information, fill in the form.

Update tax details

Field	Description
Supplier	Automatically populated with your supplier organization
New or existing supplier tax ID	Whether tax details have to be added or updated for new or existing Tax ID
Existing tax ID	Existing tax identification number (appears only if Add new tax ID option is selected

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Field	Description
Supplier tax ID	Tax identification number to be updated
Supplier tax type	Type of tax identifier
Country	Country for which the tax information applies
Active	Whether the Tax ID is active by default

5. Select the tax record from the displayed list to update existing tax information, and modify the required fields.
6. Select **Submit**.
   The system validates that a tax record does not already exist for the same supplier and country combination. If a duplicate is detected, an error message appears prompting you to change the values.

Result
After successful validation, a case is created and assigned to a supplier manager for review.

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

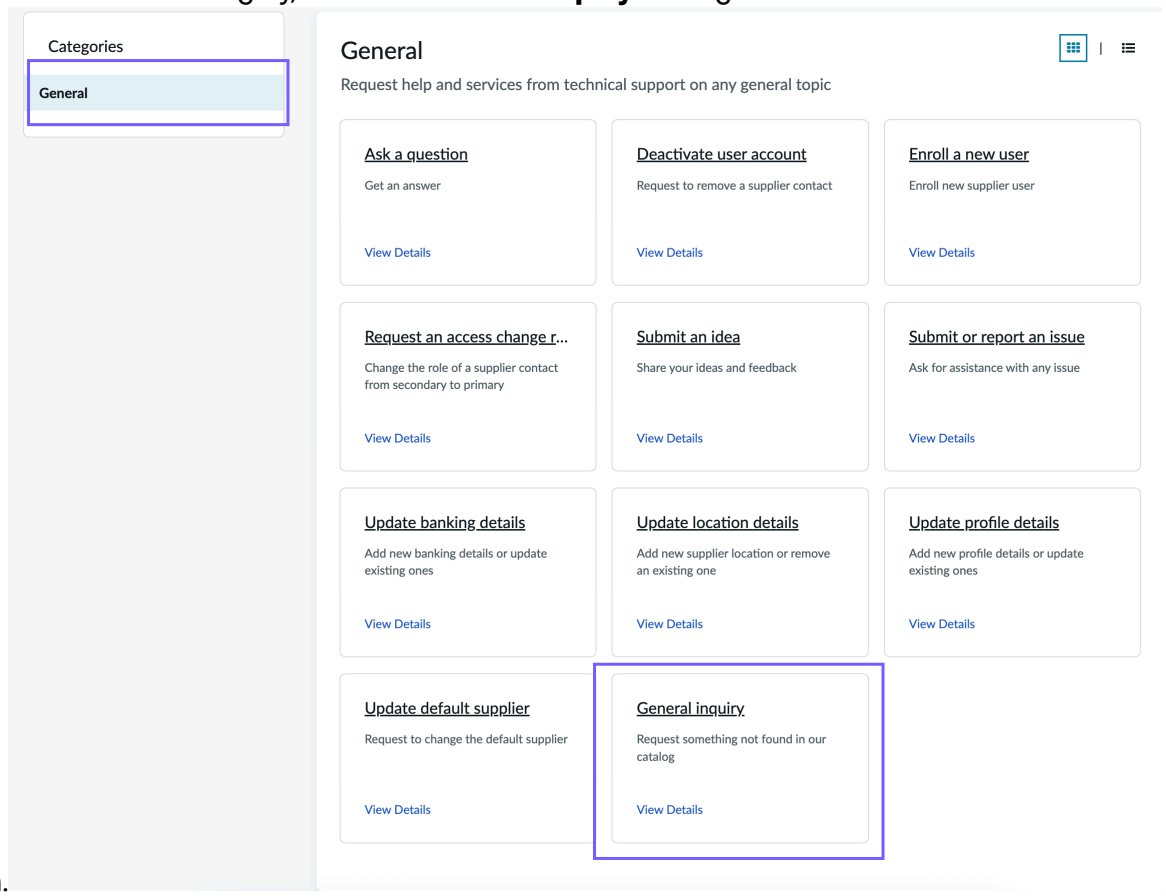
Procedure
1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   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**.

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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.

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**.

Result

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.

Related topics

Raising requests from the Supplier Collaboration Portal

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:

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- Mark Complete: Mark the task as complete.
- View Link: Open a link to complete the task.
- Play Video: Play a video to complete the task.
- E-Signature: Sign documents electronically to complete to task.
- Catalog Item: Submit a catalog item to complete the task.
- Survey: Take a survey to complete this task.
- Checklist: Complete a checklist to complete the task.
- Upload Document: Upload a document to complete the task.

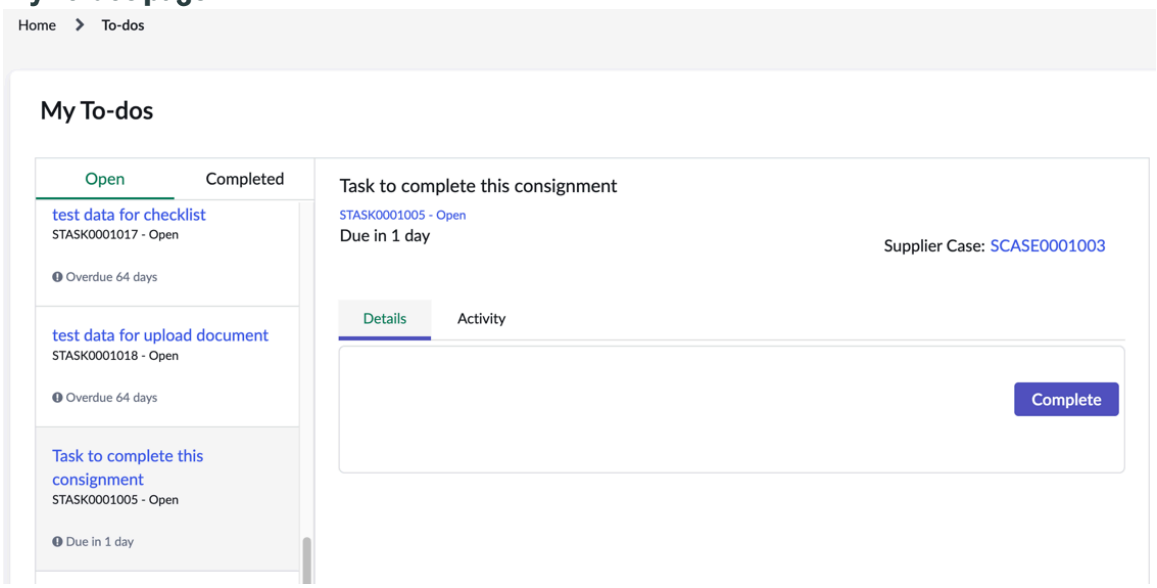
Viewing your tasks

The My To-dos page lists all the tasks that are assigned to the logged-in user.

To open the My To-dos page, do one of the following on the Supplier Collaboration Portal home page:

- In the Supplier Collaboration Portal header, select **My Tasks**.
- (If you are a primary contact) In the Supplier Collaboration Portal header, select **Tasks** and then select **My Tasks.**
- In the My active items widget, select **Tasks**.

My To-dos page



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:

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- **Details:** Displays details of the selected task.

  Note: The information displayed on this tab varies depending on the task type.

- **Activity:** Displays a chronological record of the updates made to the to-do since it was created. To add your comments to the activity stream, select **Post**. Click the Add attachments icon ( ) to add attachments, such as documents and image files, to the to-do.

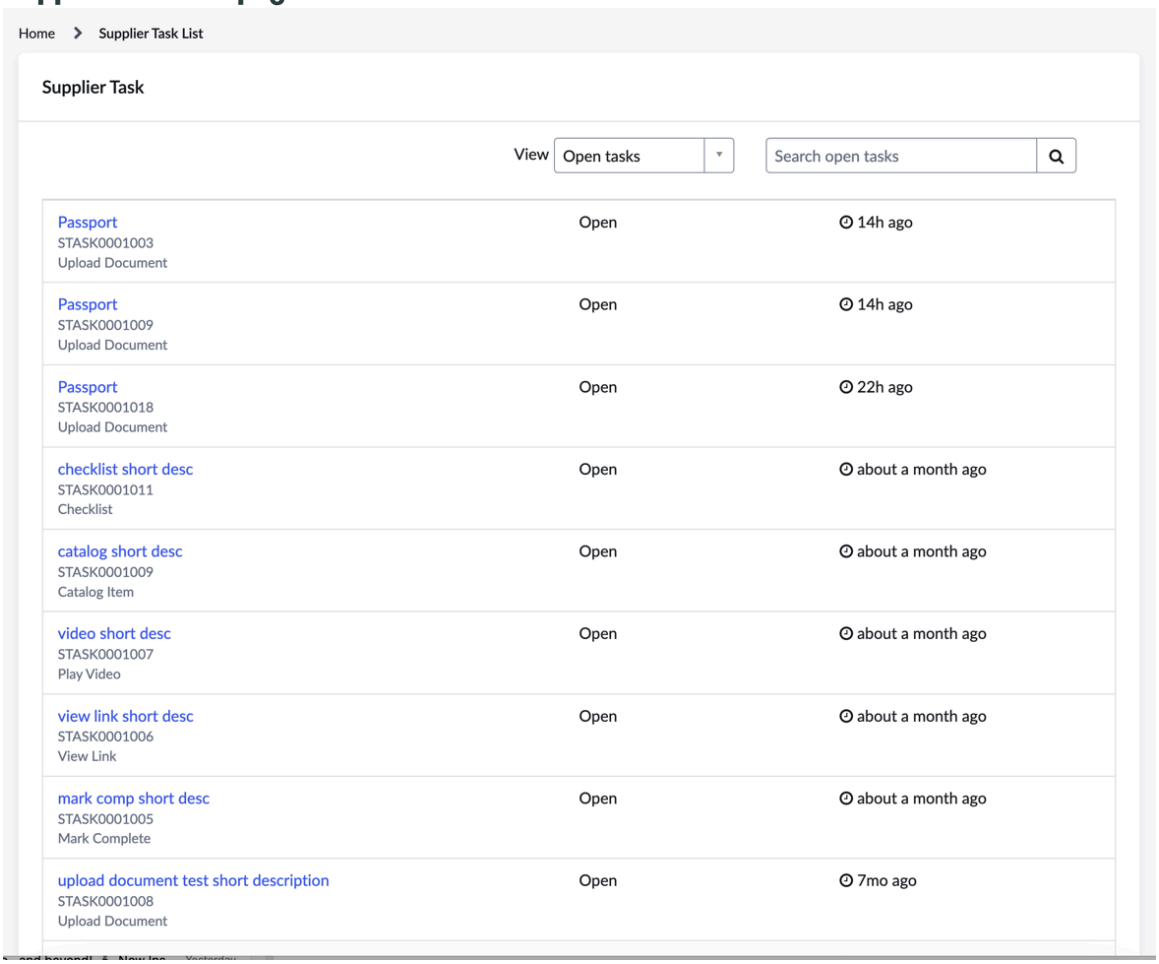
Viewing all the tasks

The Supplier Task List page displays both the tasks assigned to you and the tasks assigned to other contacts.

To open the Supplier Task List page, in the Supplier Collaboration Portal header, select **Tasks** and then select **All Tasks**.

Note: The **All Tasks** option is available only to the primary supplier contact and the supplier administrator.

Supplier Task List page



On the Supplier Task List page, you can do one of the following:

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- 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.

Related topics

Approve or reject a task

Raising requests from the Supplier Collaboration Portal

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 sn_slm.admin

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. In the portal header, select **My Tasks**.

   The My To-dos page is displayed.
3. On the **Open** tab, select a task.
4. In the **Do you want to approve the following:** field, enter your comments and select **Approve** or **Reject**.

Related topics

Viewing supplier contact tasks from the Supplier Collaboration Portal

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:

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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**.

Related topics

Raising requests from the Supplier Collaboration Portal

View all your requests from the Supplier Collaboration Portal

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

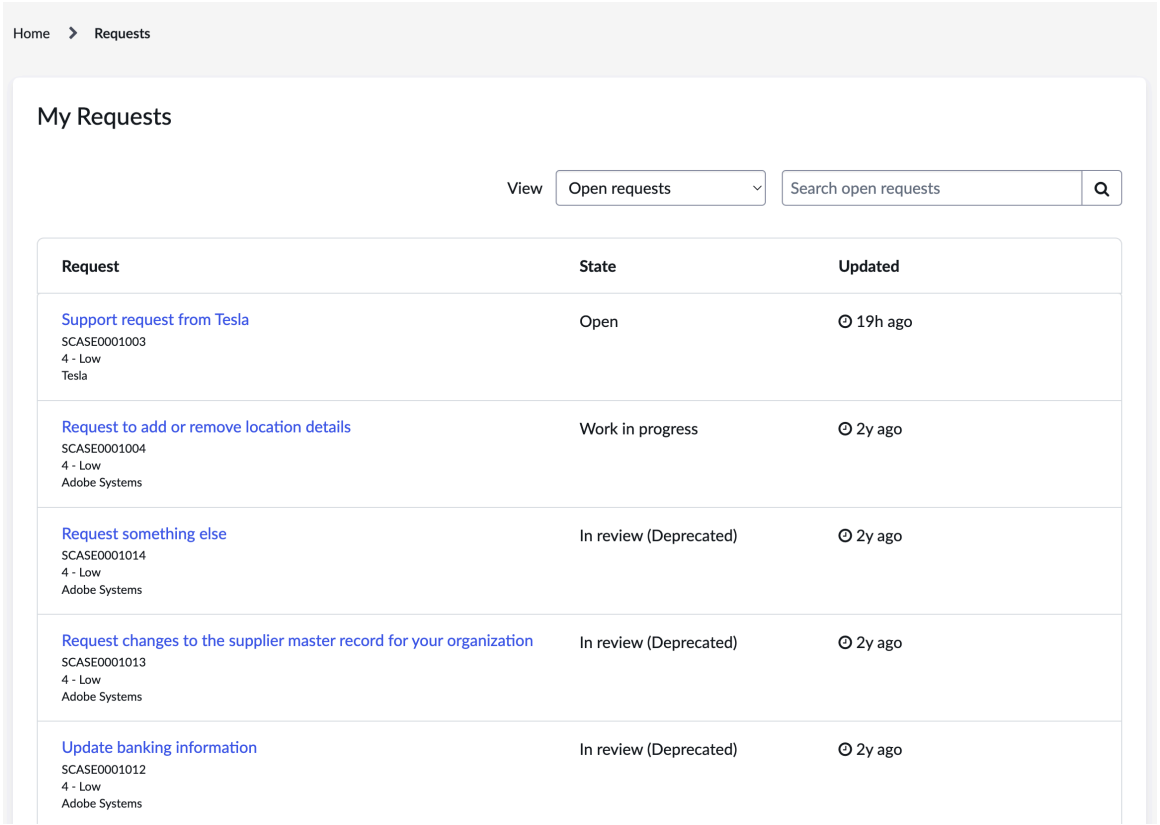
The My Requests page displays all the requests that you've raised. For more information about raising requests, see Raising requests from the Supplier Collaboration Portal.

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.

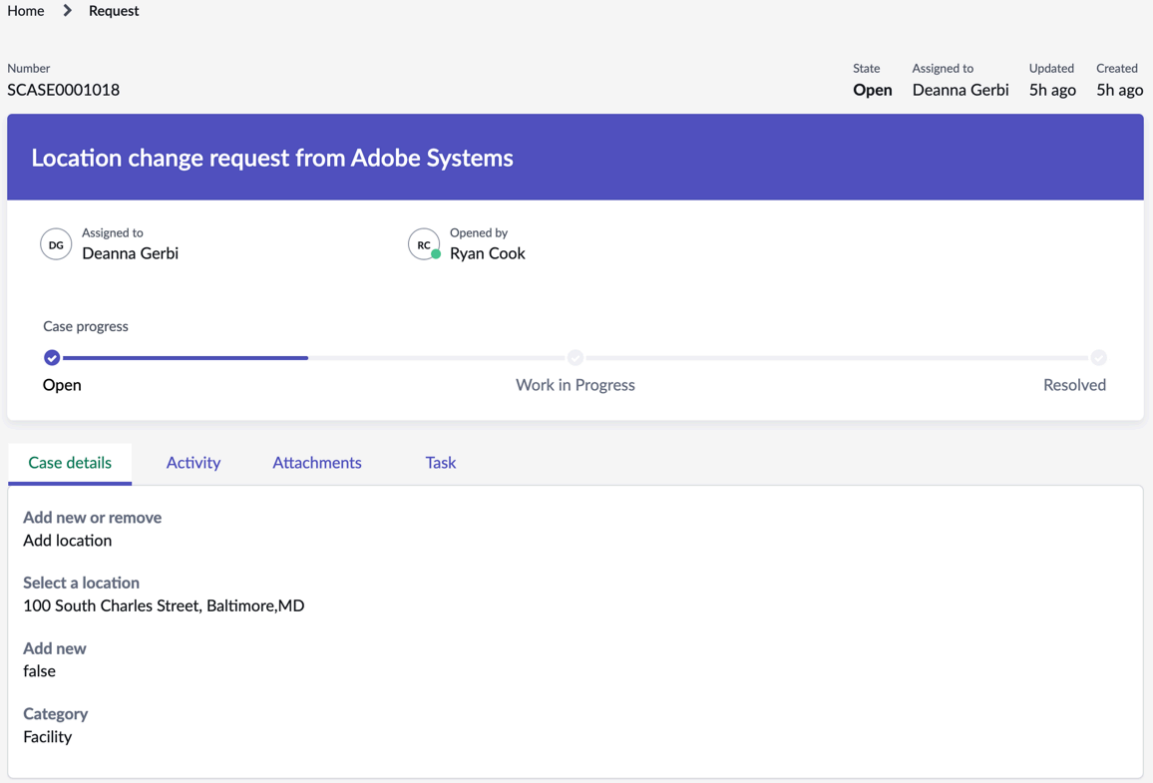
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Note: You can see all requests from all the suppliers linked with your profile if M2M mapping between supplier contact and suppliers is enabled (available from Xanadu December 2024 release onwards).

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.

Related topics

Raising requests from the Supplier Collaboration Portal

View or update your user profile from the Supplier Collaboration Portal

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

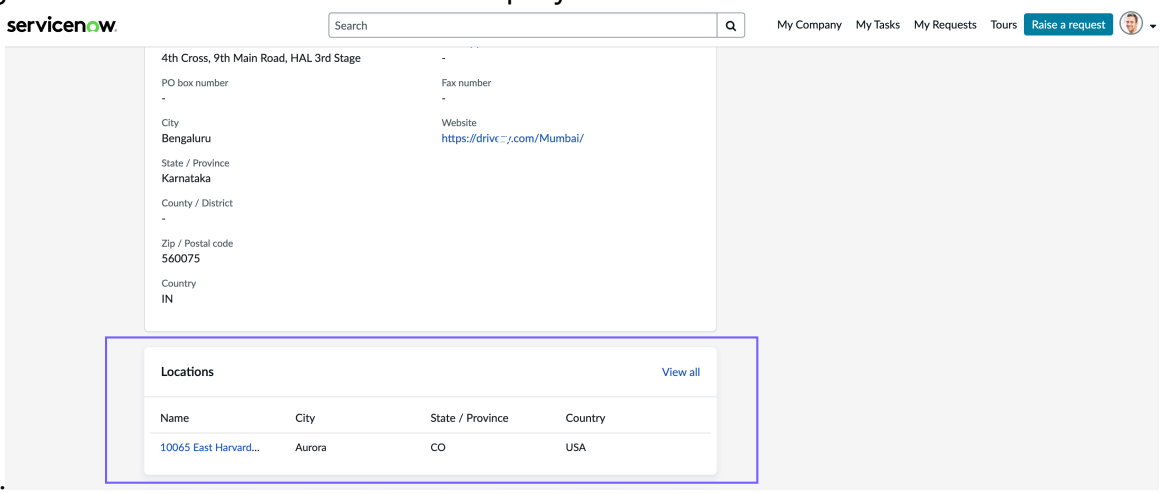
Role required: sn_slm.contact

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.



Result

The Locations section displays the details about your locations. You can 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**.

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Related topics

Raising requests from the Supplier Collaboration Portal

View all your requests from the Supplier Collaboration Portal

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

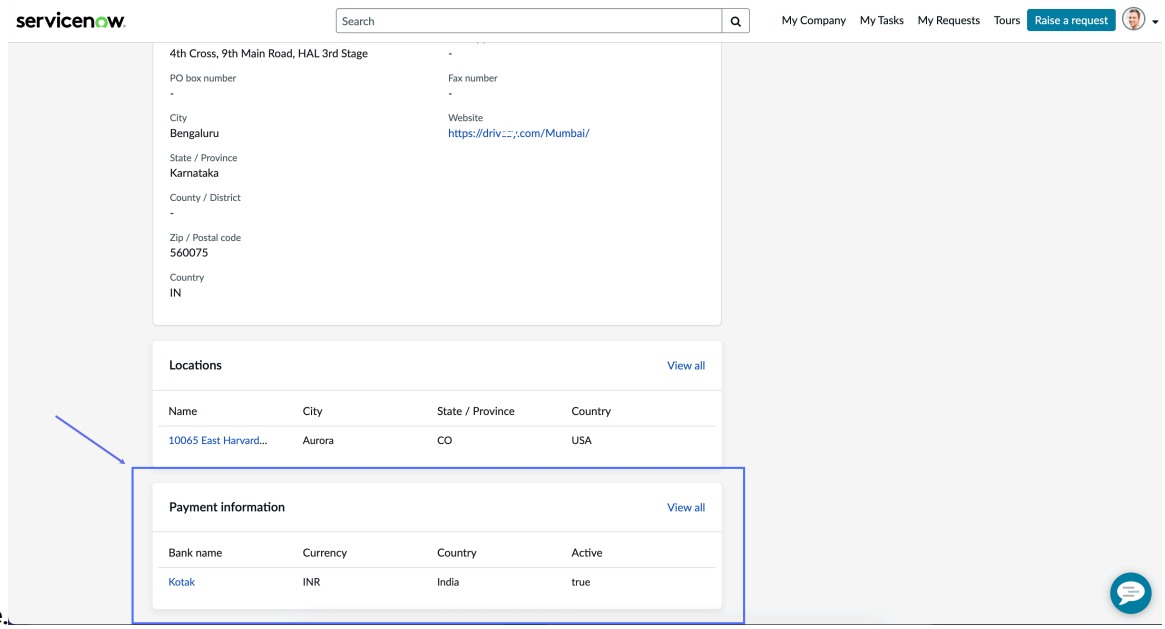
Role required: sn_slm.contact

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.

   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.



Result

The Payment Information section displays the details about your banks. You can 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**.

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Related topics

Raising requests from the Supplier Collaboration Portal

View all your requests from the Supplier Collaboration Portal

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

Important: Check your entitlements to determine whether you have access to Live Agent Support. The chat functionality is available only if Supplier Operations (com.snc.sn_so) and its dependent plugins Supplier Case Management (com.snc.sn_supplier_mgmt) and Document Management (com.snc.platform_document_management) are installed.

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 ( ).

Related topics

Raising requests from the Supplier Collaboration Portal

View all your requests from the Supplier Collaboration Portal

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. You can upload, and download documents using one of the following methods.

Action	Description
Upload or download a document from the My Company page	Upload documents from the My Company page. For more information, see Manage documents from My Company page.
Upload documents from the My Tasks page	Upload documents from the My Tasks page to complete tasks assigned by the supplier relationship manager. For more information, see Upload document from My Tasks page.
Upload, download, manage permissions, from the Documents tab	This tab lets you manage documents without needing a supplier manager to initiate the process first.For more information, see Manage documents from Documents tab.

Related topics

Raising requests from the Supplier Collaboration Portal

View all your requests from the Supplier Collaboration Portal

Manage documents from Documents tab

The Documents tab lets supplier contacts upload and manage documents without needing a supplier manager to initiate the process first. Supplier contacts can also manage document permissions from the Documents tab.

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 **Documents** tab.
3. Upload, download, maintain versions, or manage permissions for documents as follows.

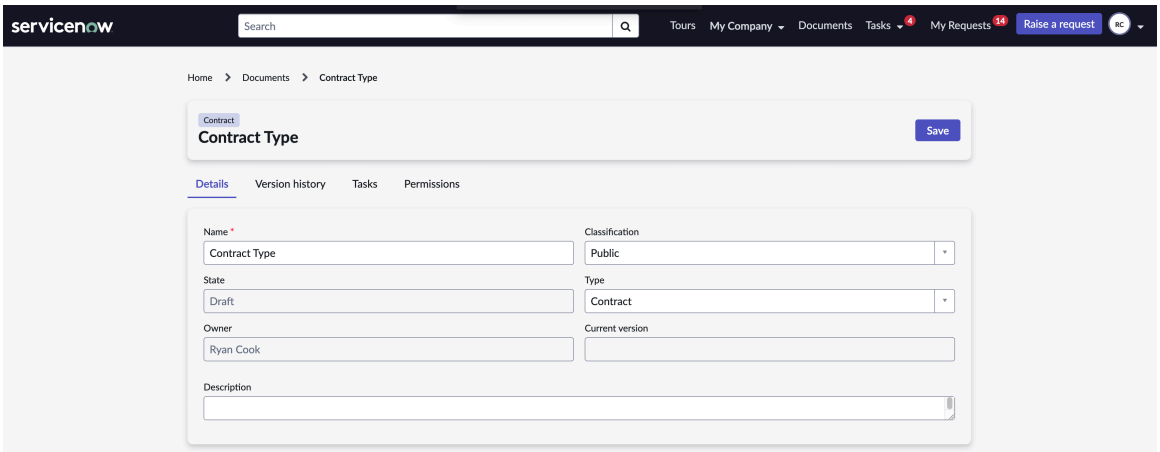
Action	Description
Create a new document	Use this option to upload documents without needing a supplier manager to initiate the process first. **a.** Select **Create Document**. **b.** Fill in the document details, such as the owner, document classification, and document type.

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Action	Description
	c. Upload your document in the Attachments section. **d.** Select **Save**.
Upload a new version	Use this option when you want to upload a new version of an existing document: **a.** Select a document from the list. **b.** Go to the **Version history** tab. **c.** Select **Add version**. **d.** Upload the new version. **e.** Select **Submit**.
Manage document permissions	Use this option to manage read and write per missions for a document. **a.** Select the document. **b.** Go to the **Permissions** tab. **c.** Provide read or write access to supplier contacts, as required. **Note:** The document owner and pri mary supplier contact are automatical ly granted read and write access. Se condary contacts are granted read ac cess by default.
Download a document	Download the latest or specific version of a document. **a.** Select a document. **b.** To download the latest version, select **Download latest attachment**. **c.** To download a previous version, go to the **Version history** tab.

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Action	Description
	i. Select the document version from the ver sion history. ii. Select the download icon.



Related topics

- Configure document expiration monitoring attributes
- Manage documents from My Company page
- Upload document from My Tasks page

Manage documents from My Company page

You can upload, update, and download documents and document templates from the document widget on the My Company page.

Before you begin

Role required: sn_slm.contact

About this task

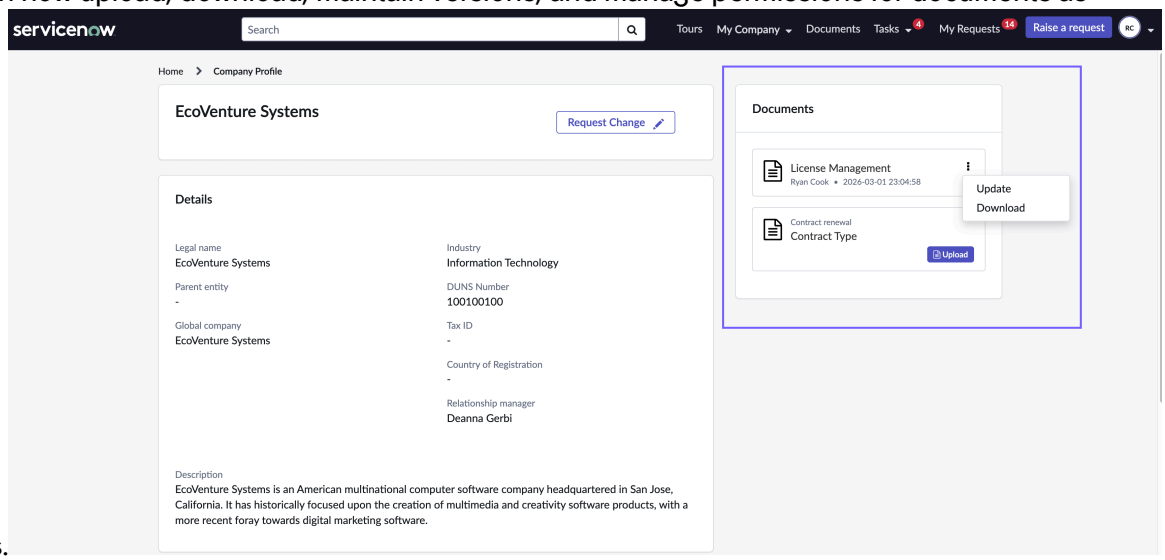
Access to the Documents widget on the My Company page is controlled by the user criteria admins set on the Manage access tab when creating the supplier document configuration. For more information, see Create a supplier document configuration.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. In the portal header, select **My Company**.
3. Select the supplier from the list of suppliers, if applicable.
4. Go to the Documents widget.

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You can now upload, download, maintain versions, and manage permissions for documents as follows.



To do	Do this
Upload a document	To upload a document: **a.** Select the document that you want to upload. **b.** Select **Upload**. **c.** Upload your document in the Attachments section. **d.** Click **Submit**
Download the document template	The document template specifies the expected format of the document that you must upload. To download the document template: **a.** Select the document. **b.** Select **Get template**.
Update an already uploaded document	To update an existing document: **a.** Select the document. **b.** Select the three vertical dots icon (⋮) on the selected document tile and then select **Update**. **c.** Upload the updated document in the Attachments section.
Download a document	To download a document:

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To do	Do this
	a. Select the document. **b.** Select the three vertical dots icon (⋮) on the selected document tile. **c.** Select **Download**.

Upload document from My Tasks page

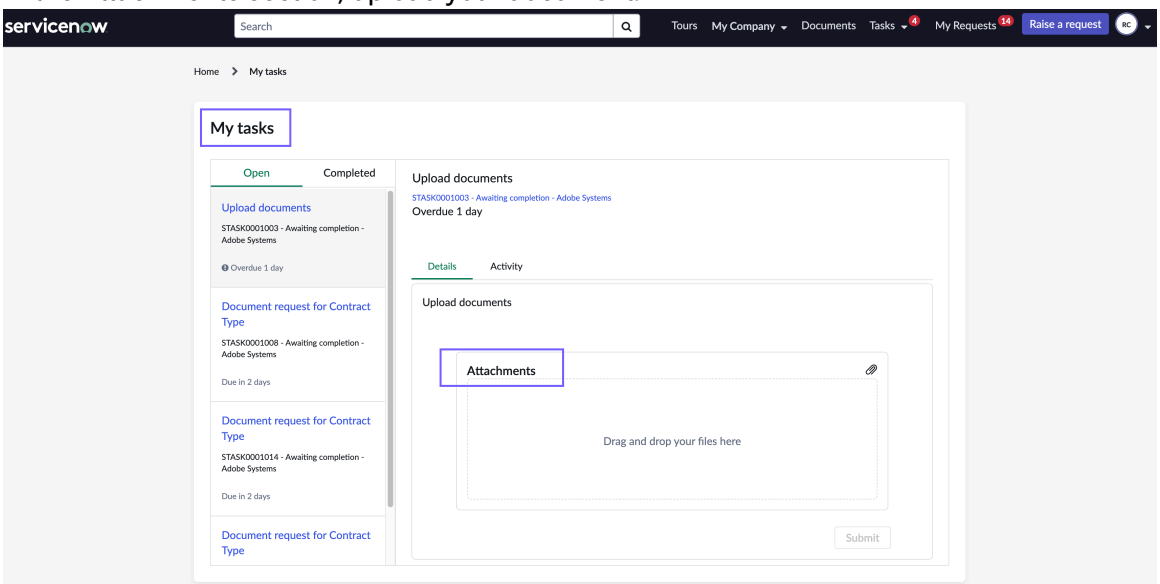
Complete the document upload tasks assigned to you from the My tasks page on the Supplier Collaboration Portal.

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 **My Tasks**.
3. Go to the **Open** tab.
4. Select a document upload task.
5. In the Attachments section, upload your document.



6. Select **Submit**.

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

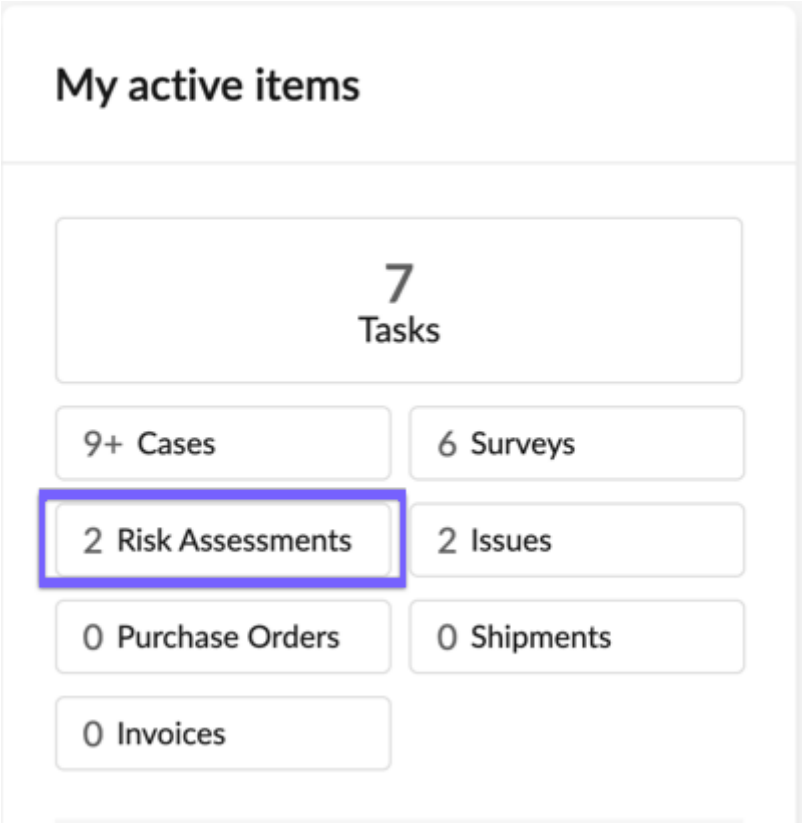
View and complete risk assessment records that a supplier manager creates when onboarding a new supplier or reassessing an existing engagement with a supplier.

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The **Risk Assessments** tab shows assessments only if you've installed the Third-party Risk Management [com.sn_vdr_risk_asmt] plugin.

Procedure

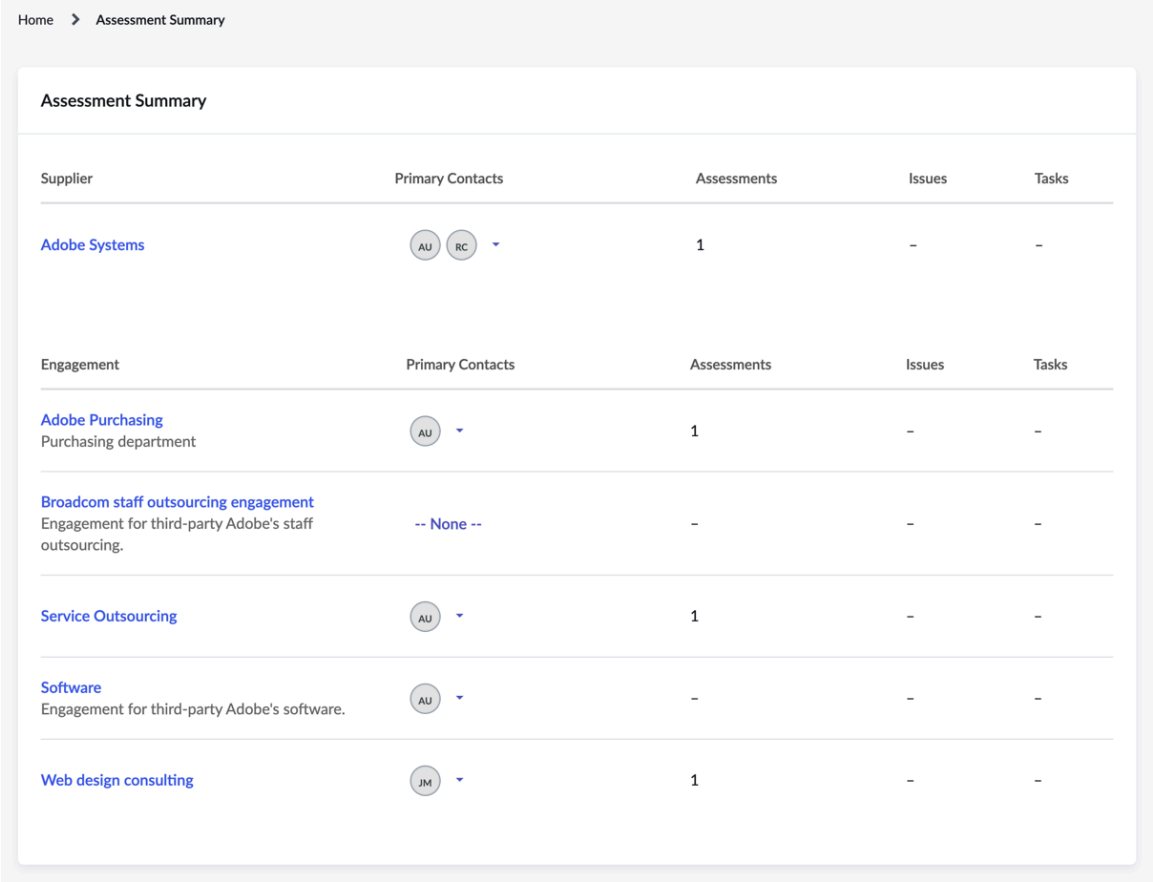
1. Go to the Supplier Collaboration Portal portal page by accessing your instance URL and adding a /supplier suffix.
   For example, `https://example.com/supplier`.
2. In the My active items widget, select **Risk Assessments**.



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.

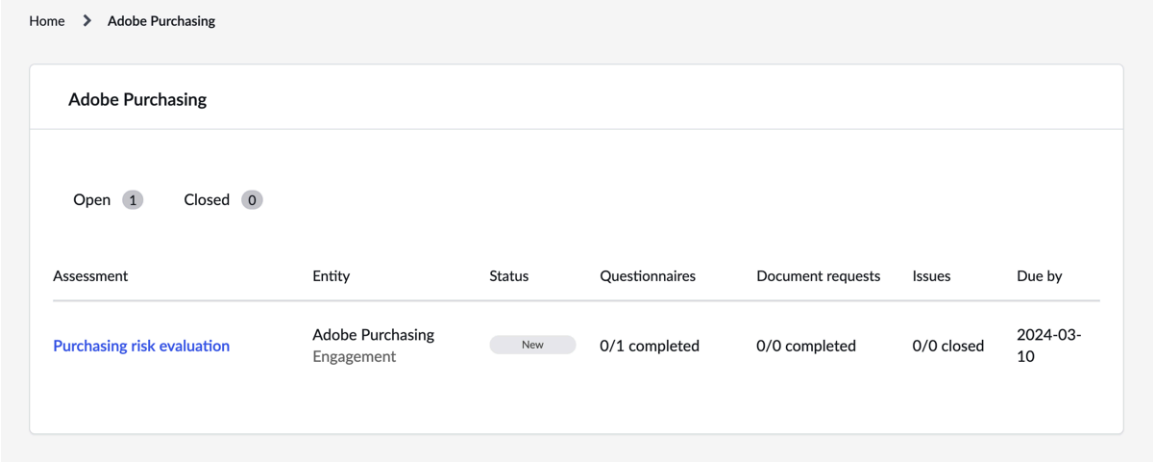
The Assessment Summary page has these columns.

- **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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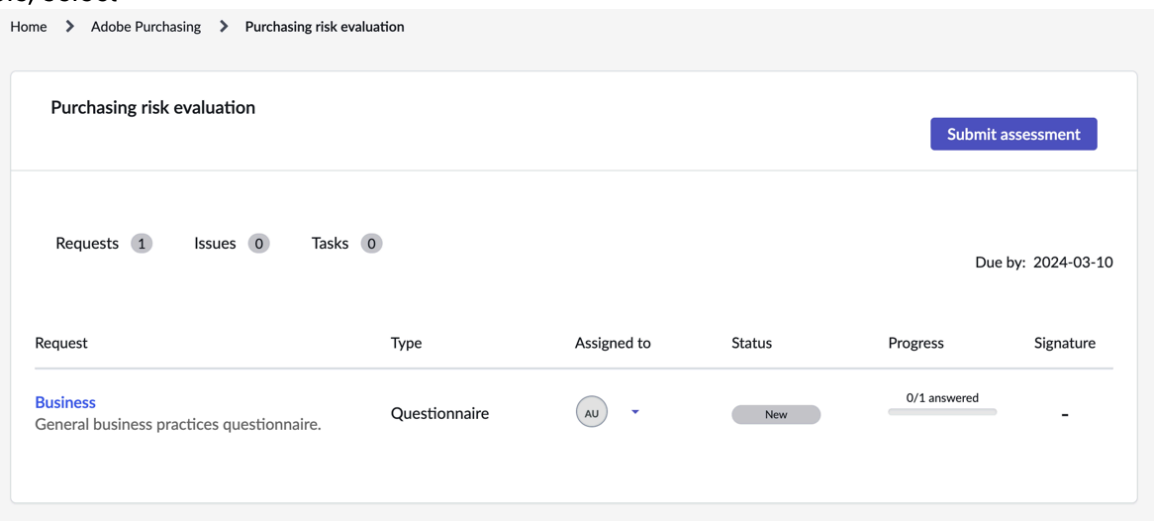


The assessment details page has these columns.

- **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.

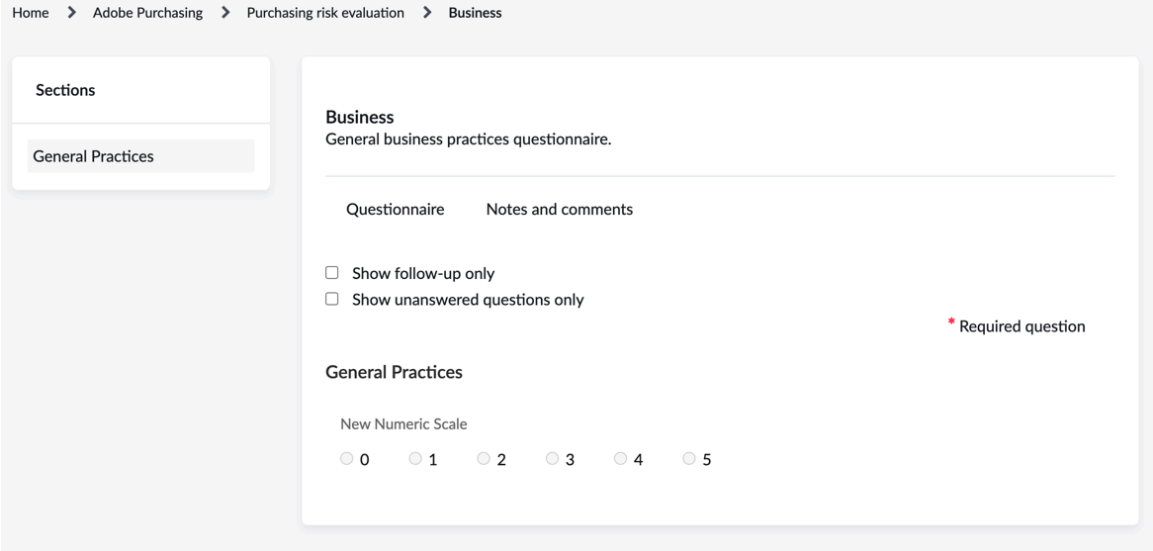
   For example, select **Business**.



   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**.

Result

The risk assessment form is submitted and the supplier manager can evaluate it further.

Related topics

Using Supplier Collaboration Portal

Create a Universal Request from the Supplier Collaboration Portal

Create a Universal Request to raise issues that do not fit into predefined case types or involve multiple departments.

https://player.vimeo.com/video/1191681993?h=d2dabe9804&badge=0&autopause=0&player_id=0&app_id=58479%22

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 search bar, enter your search query.
3. Navigate to the **Contact us for help** section.
4. Select the **Request help** option.
5. In the Request Help form, fill in the request details.
   The **Supplier** field is populated automatically and is not editable.
6. **Optional:** If the request contains sensitive information, do the following:

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a. Select the **Issue contains sensitive or confidential information** check box.

b. From the Select department for your issue drop-down, select a department related to your issue.

7. Select **Submit**.

Result

A Universal Request is created based on the details provided in the Request Help form. For more information on the workflow, see Universal Request.

Related topics

Universal Request

Create supplier case from Universal Request

Using Supplier Relationship and Performance Management

Use Supplier Relationship and Performance Management for monitoring and managing supplier performance.

Important: Check your entitlements to determine whether you have access to Supplier Relationship and Performance Management.

Related topics

Run segmentation rule

Complete a KPI collection task from the Source-to-Pay Workspace

Complete a KPI collection task from the Supplier Collaboration Portal

View KPI data from the List page of the Source-to-Pay Workspace

Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace

View supplier performance dashboard

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

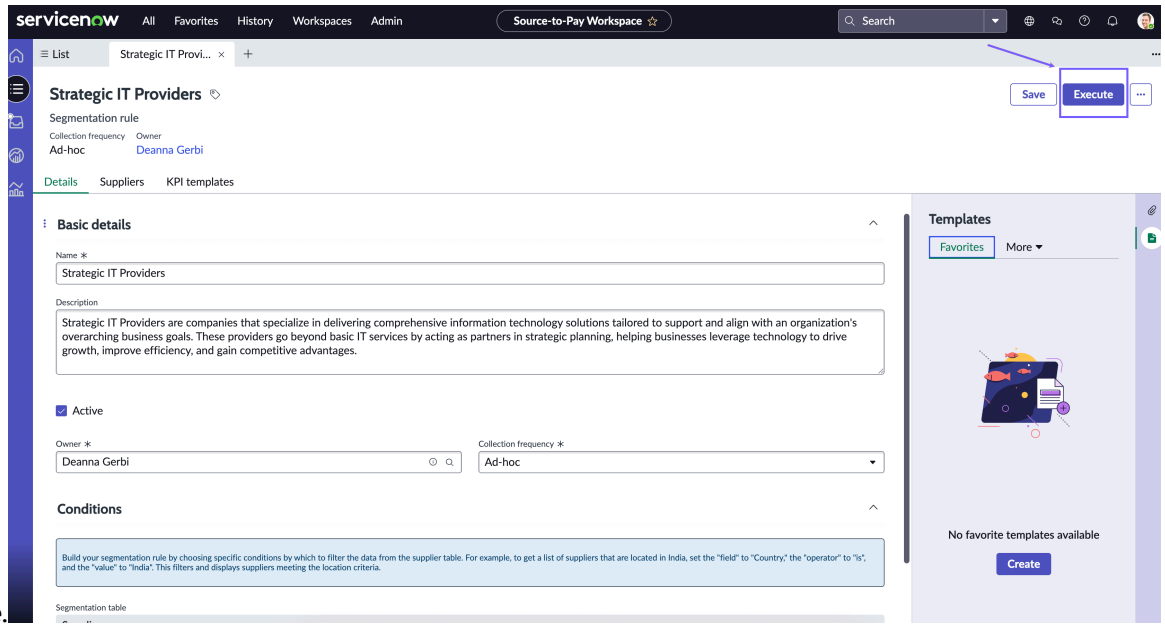
Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

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**.

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3. In the Name column, select the link to the segmentation rule.
4. Select Execute.



Result

Running the segmentation rule does the following:

- 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.
- KPI scores will not appear in the performance dashboard until those collection tasks are completed.

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.

Related topics

Using Supplier Relationship and Performance Management

Complete a KPI collection task from the Source-to-Pay Workspace

Complete a KPI collection task from the Supplier Collaboration Portal

View KPI data from the List page of the Source-to-Pay Workspace

Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace

View supplier performance dashboard

Create action plan for KPIs

Complete a KPI collection task from the Source-to-Pay Workspace

Submit KPI performance data from Source-to-Pay Workspace to complete assigned KPI collection tasks automatically.

https://player.vimeo.com/video/1143970901?h=cd6c33c333&badge=0&autopause=0&

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Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

A KPI is instantiated when:

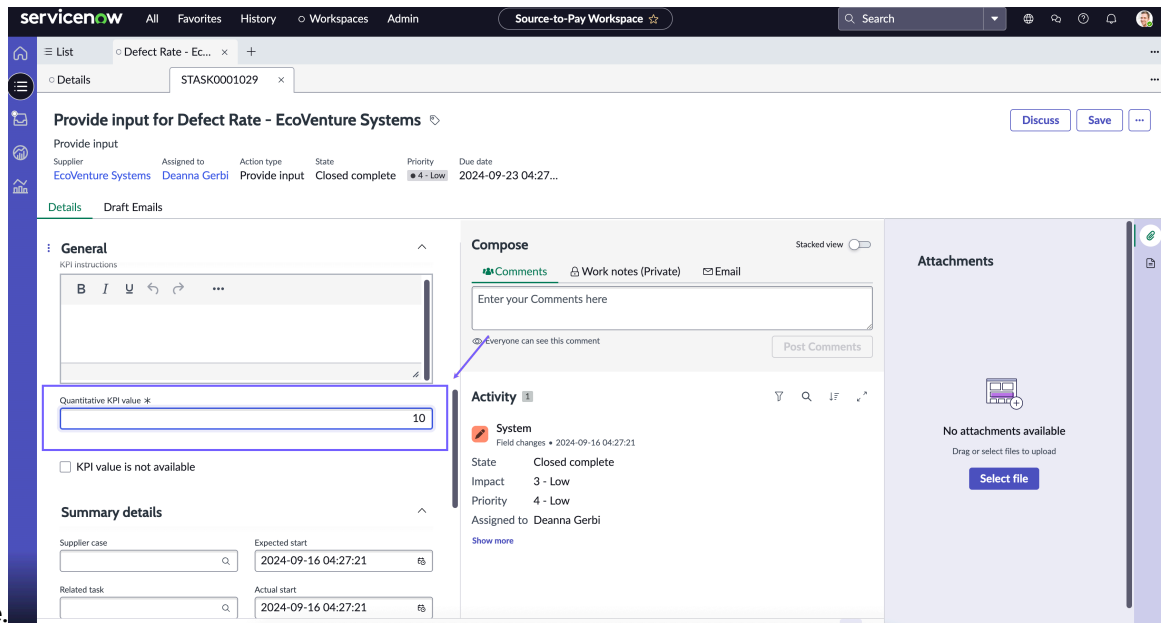
- A segmentation rule is run.
- A supplier is added to the KPI template.
- An existing KPI template is added to the KPI management tab of a supplier.

Note:

A KPI collection task is also generated when an automated KPI fails to extract data.

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**.

Result

The KPI collection task is marked as complete.

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Related topics

- Using Supplier Relationship and Performance Management
- Run segmentation rule
- Complete a KPI collection task from the Supplier Collaboration Portal
- View KPI data from the List page of the Source-to-Pay Workspace
- Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace
- View supplier performance dashboard

Complete a KPI collection task from the Supplier Collaboration Portal

Submit KPI performance data from Supplier Collaboration Portal to complete assigned KPI collection tasks.

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.

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**.

Result

The KPI collection task is marked as complete.

Related topics

- Using Supplier Relationship and Performance Management
- Run segmentation rule
- Complete a KPI collection task from the Source-to-Pay Workspace
- View KPI data from the List page of the Source-to-Pay Workspace

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Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace

View supplier performance dashboard

View KPI data from the List page of the Source-to-Pay Workspace

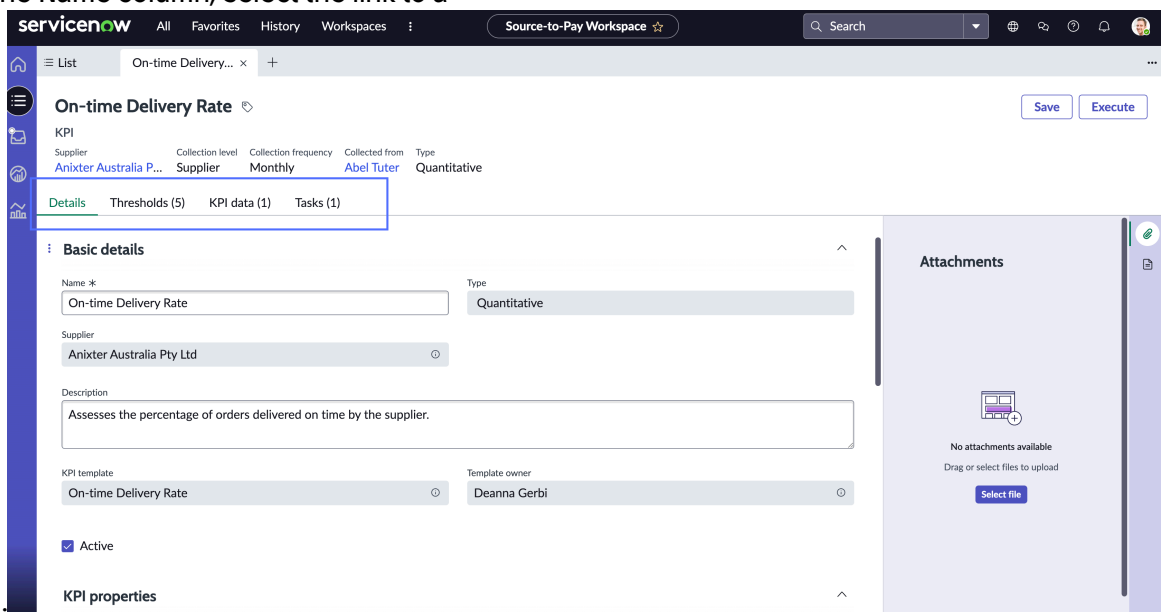
You can view the details of the existing KPIs from the List view page.

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.

Result
You are directed to the detailed-view page of the selected KPI.

Related topics

- Using Supplier Relationship and Performance Management
- Run segmentation rule
- Complete a KPI collection task from the Source-to-Pay Workspace
- Complete a KPI collection task from the Supplier Collaboration Portal
- Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace
- View supplier performance dashboard

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

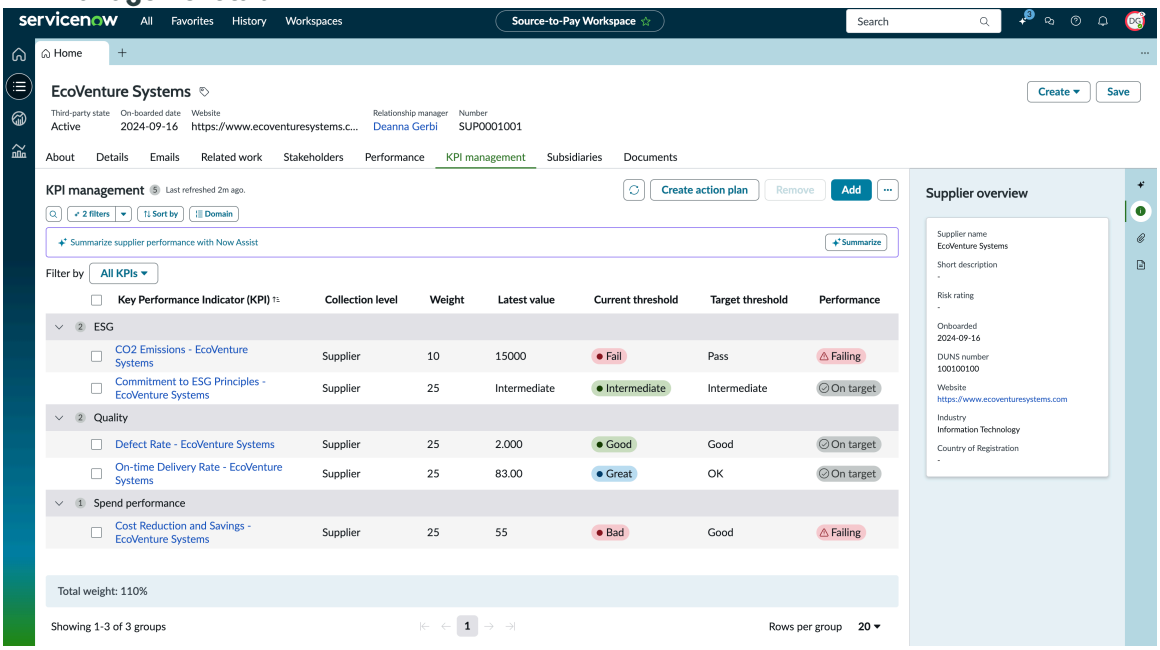
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under **Quick actions**, select **Manage my suppliers**.
3. Under **My suppliers**, select the legal name of the supplier.
4. Select the **KPI management** tab.

   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.

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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



Result

- You can filter the KPIs by **All KPIs**, **Supplier level KPIs**, **Contract level KPIs**, **Manual KPIs**, or **Automated KPIs**.
- You can add new KPIs or remove existing KPIs for the selected supplier from the **KPI management** view.
- You can generate comprehensive performance summary including overall performance scores, trends, and action items by using supplier performance summarization.

> **Note:** This functionality is available with the ServiceNow Otto for Supplier Lifecycle Operations (SLO) application.

Related topics

Supplier Relationship and Performance Management

Using Supplier Relationship and Performance Management

Run segmentation rule

Complete a KPI collection task from the Source-to-Pay Workspace

Complete a KPI collection task from the Supplier Collaboration Portal

View KPI data from the List page of the Source-to-Pay Workspace

View supplier performance dashboard

Create action plan for KPIs

Create action plan for KPIs

Create action plans for under-performing KPIs to track improvement milestones and assigned tasks for suppliers in the Supplier Collaboration Portal.

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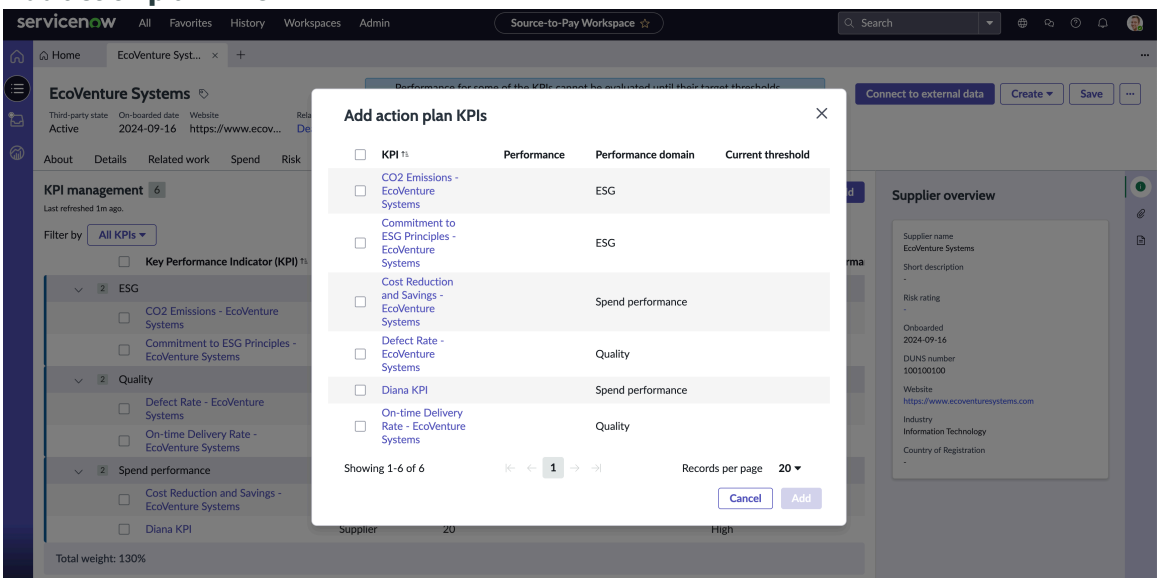
Before you begin

Role required: sn_kpi.admin

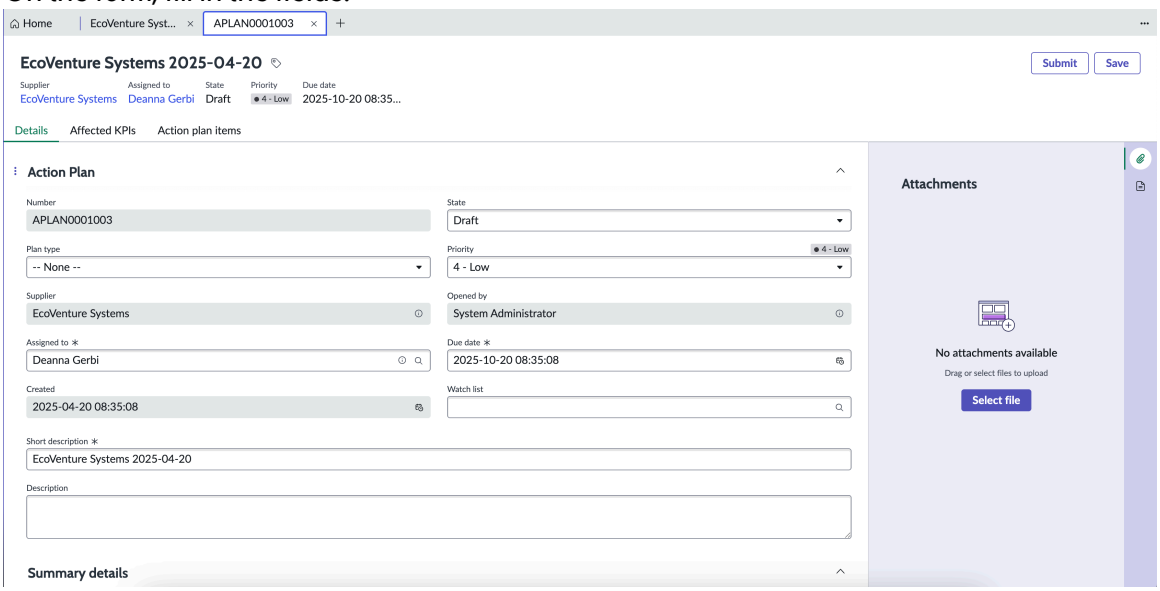
Procedure

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.
5. Select **Create action plan**.
6. Select the KPIs to be tracked.

Add action plan KPIs



7. Select **Add**.
8. On the form, fill in the fields.



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Action Plan form

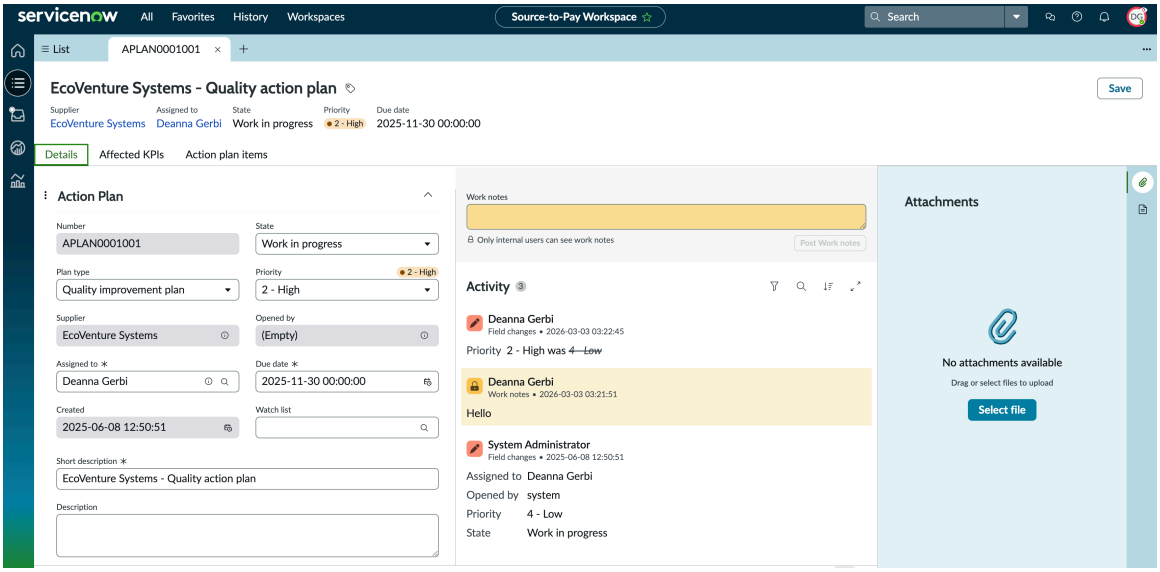
Field	Description
Number	Auto-generated action plan ID
State	State of the action plan. By default it is in Draft state
Plan type	Type of action plan to be created: ○ Quality improvement plan ○ Delivery improvement plan ○ Cost reduction plan ○ Sustainability and compliance plan ○ Communication and collaboration plan ○ Performance monitoring plan
Priority	Priority of the action plan
Supplier	Supplier related to the action plan
Opened by	User who created the action plan
Assigned to	User who is assigned the action plan **Note:** This field is not available for action plans created for automated KPIs.
Due date	Due date for the completion of the action plan
Created	Date of creation of the action plan
Watchlist	List of users included in the watchlist
Short description	Brief description of the action plan
Description	Detailed description of the action plan

9. Navigate to **Action plan items** and select **Create**.
10. Create milestones or supplier tasks for each KPI to track the action plan.
    For more information on how to create milestones and supplier tasks, see Create milestones for the action plan and Create supplier tasks for the action plan.
11. Select **Submit** to activate the action plan.

    The corresponding milestones and tasks are generated for the action plan.

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Internal users can add comments through the **Work notes** and the progress of the action plan can be tracked in the **Activity** stream section.



Result

An action plan is created in draft state and must be assigned to a reviewer to advance the workflow.

After the milestones are run, corresponding tasks are generated for the users assigned to those milestones. When they complete their tasks, performance metrics are recalculated to determine whether the KPIs are still on target or failing. If a KPI is linked to a milestone or an action plan, the dashboard highlights its status:

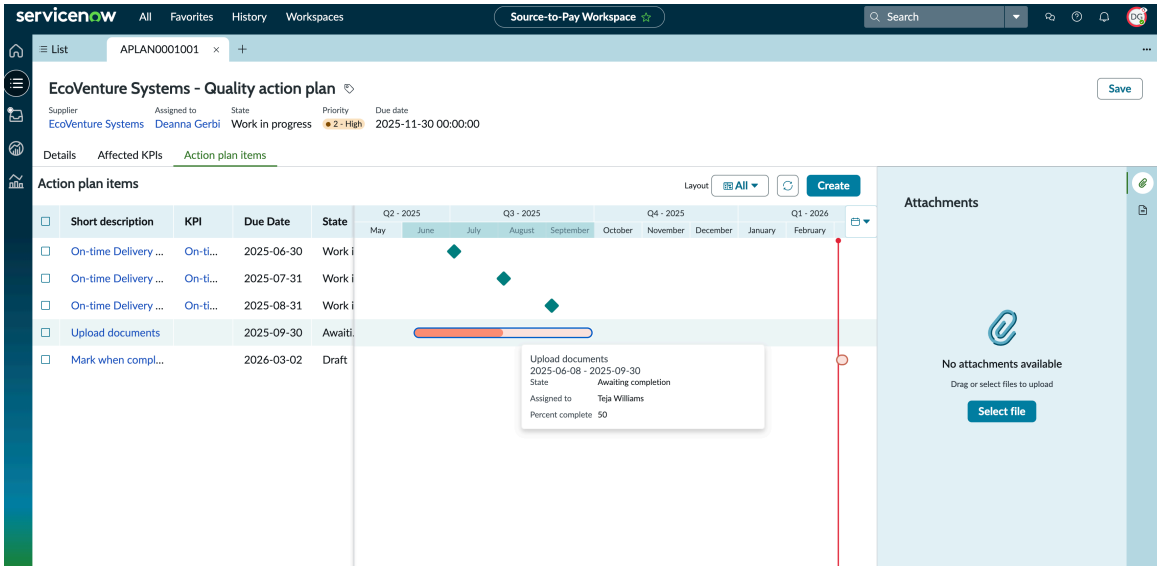
- On Target – if the KPI is meeting or exceeding the target
- Failing - if the KPI is not meeting its current target
- Failing in a plan - if the KPI is in an action plan and isn't meeting its milestone targets
- Part of a Plan - if the KPI is in a plan and progressing but not failing

Emails are sent to the assignees when action plans are created. Emails are also sent in the following scenarios:

- When there's any change in the action plan
- When an action plan fails (tasks or milestones aren't completed after the due date)
- When an action plan expires
- When an action plan is completed

The action plan can be tracked continuously, with updates based on the subsequent KPI runs. Managers can monitor the progress of milestones and tasks using the Gantt chart.

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The following color code is followed to represent different tasks in the Gantt chart:

- Teal: Active tasks within due date
- Blue: Active tasks past due date and completed
- Orange: Active tasks past due date but not completed

Create milestones for the action plan

Create milestones for the affected KPIs in the action plan.

Before you begin

Role required: sn_kpi.admin

About this task

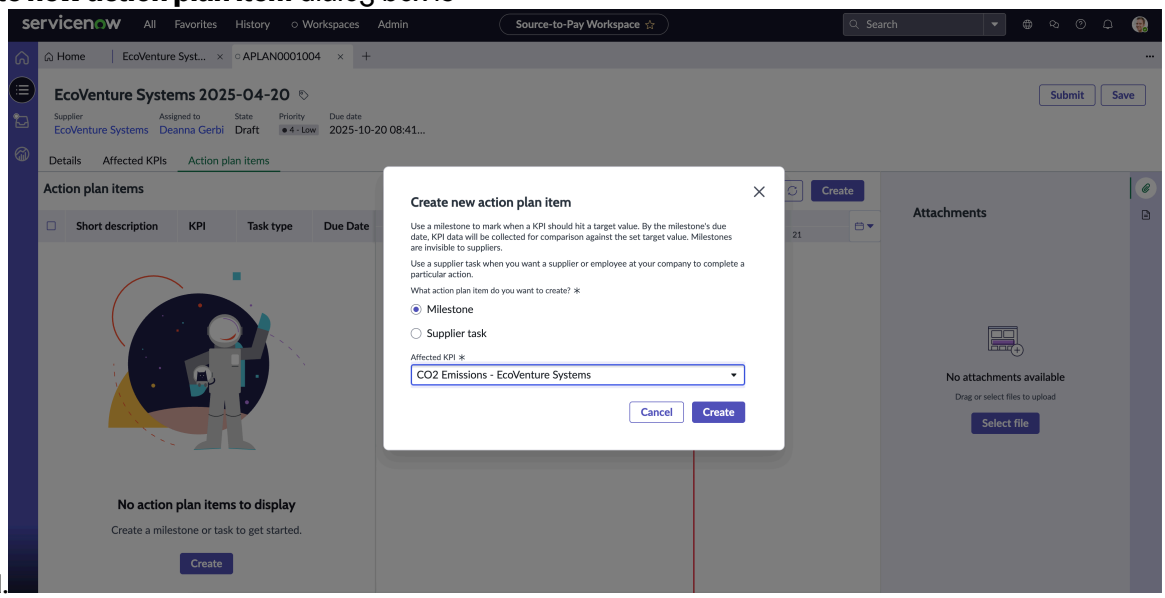
https://service%E2%80%91now.portal.trainn.co/share/bVSovamxGksjje7YKNnzIw/embed?%20Autoplay=false

Procedure

1. Navigate to the **Action plan items** tab of the action plan.
2. Select **Create**.

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The **Create new action plan item** dialog box is displayed.



3. Select **Milestone**.
4. Select the affected KPI from the list of available KPIs.
5. Select **Create**.
6. In the form, fill in the required fields.

Create New Milestone form

Field	Description
Assigned to	User to whom the milestone tracking is assigned
Due date	Target date for the milestone
Short description	Brief description of the milestone
Milestone details	
Milestone target value	The expected target value of the KPI for the milestone
Milestone collection start date	Start date for the milestone collection
Milestone collection end date	End date for the milestone collection

7. Select **Save** to create and save the new milestone.

Result

The milestones appear in the related list of the action plan.

Create supplier tasks for the action plan

Create supplier tasks for the affected KPIs in the action plan.

https://service-now.portal.trainn.co/share/bVSovamxGksjje7YKNnzIw/embed?autoplay=false

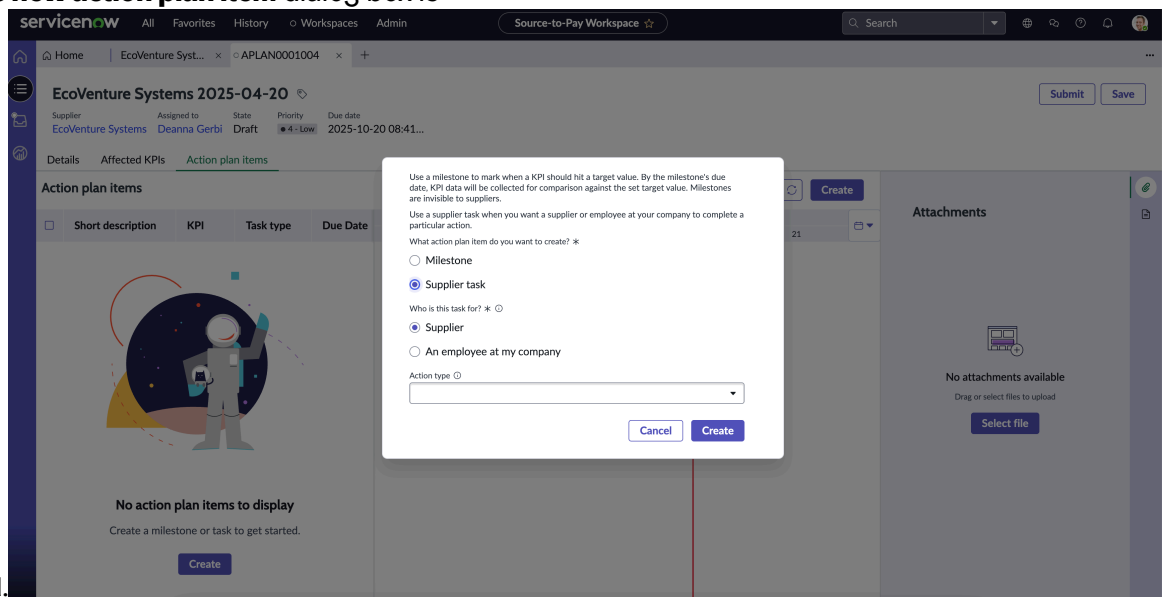
Before you begin

Role required: sn_kpi.admin

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Procedure

1. Navigate to the **Action plan items** tab of the action plan.
2. Select **Create**.
   The **Crate new action plan item** dialog box is displayed.



3. Select **Supplier task**.
4. Select the user who will be assigned this task.
5. Select the action type required to close the task:
   - Mark complete
   - Play video
   - Upload documents
   - View link
6. Select **Create**.
7. In the form, fill in the required fields.

Create New Supplier Task form

Field	Description
Supplier	Name of the supplier
Priority	Priority of the supplier task to complete the action plan
Assigned to	User to whom the milestone tracking is assigned
Due date	Target date for the milestone
Opened by	User who created the supplier task
Short description	Brief description of the milestone
Summary details	
Supplier case	The case to which the task is related
Expected start	Expected start date of the supplier task

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Field	Description
Actual start	Actual start date of the supplier task
Actual end	Actual end date of the supplier task
Related task	Tasks related to this supplier task
Related KPIs	KPIs related to this supplier task
Related location	Location in which this supplier task is to be performed

8. Select **Save** to create and save the new supplier task.

Result
The supplier tasks are visible to the supplier in the portal view.

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.

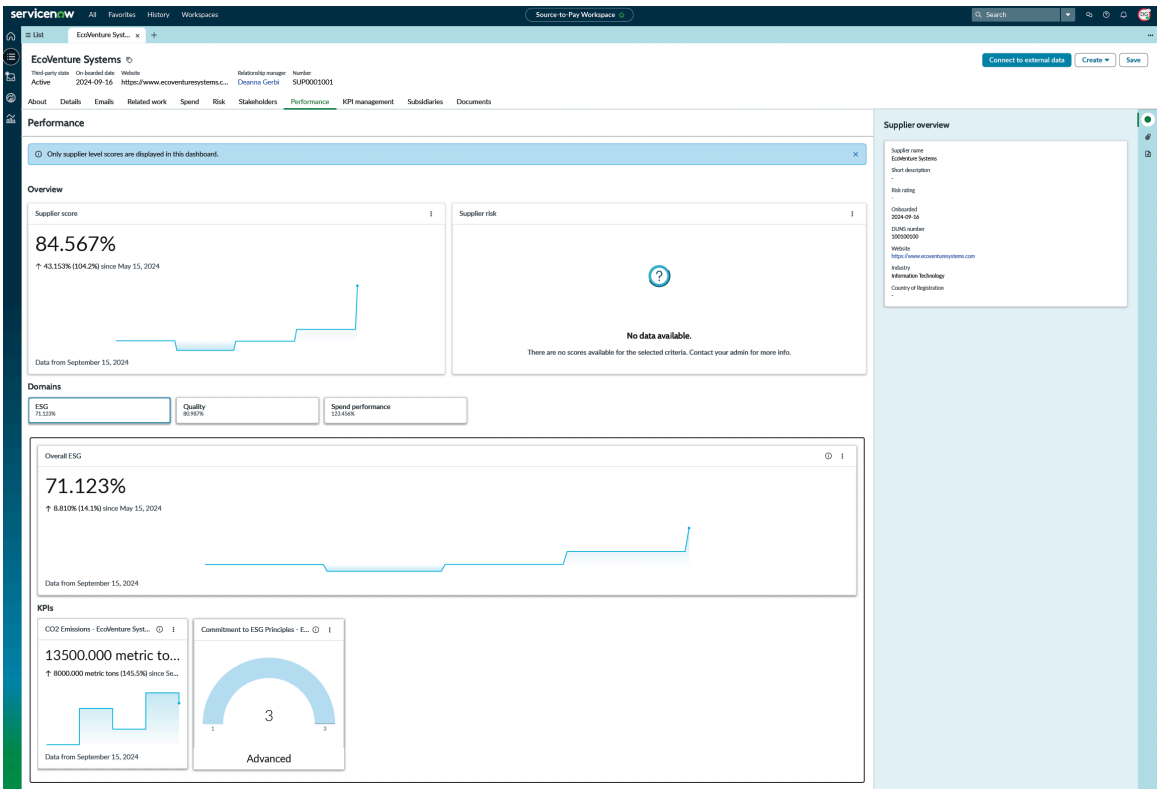
   The **Performance** tab displays the overall score and risk profile of the supplier. You can also view the performance domain-wise KPI scores of the supplier.

   Note: From the March 2026 Brazil release, all scores are calculated up to three decimal places. To implement this change, Run fix script to update the KPI weighted score field in the KPI score table.

   All the KPIs are grouped by the performance domain set in the KPI template that they were created from.

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Performance tab



Note: If **FedEx Dataworks** is integrated, the **FedEx Dataworks - supplier performance benchmarking** section is accessible for suppliers that have a FedEx Dataworks Supplier ID. Relationship managers can retrieve FedEx Dataworks logistics performance metrics for those suppliers. For more information see, View supplier metrics using FedEx Dataworks.

Result

The supplier performance dashboard is displayed with information on the latest scores of the supplier.

Related topics

- Using Supplier Relationship and Performance Management
- Run segmentation rule
- Complete a KPI collection task from the Source-to-Pay Workspace
- Complete a KPI collection task from the Supplier Collaboration Portal
- View KPI data from the List page of the Source-to-Pay Workspace
- Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace

Using Supplier Payment Optimization

Use Supplier Payment Optimization for identifying, prioritizing, and tracking suppliers with high potential of accepting credit card payments. The saving estimation tool can be used to calculate potential savings from credit card payments.

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

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Related topics

View the Payment Optimization dashboard

Estimate savings using the saving estimator tool

Add propensity score for a supplier

Add propensity scores to identify suppliers likely to accept credit card payments for optimization.

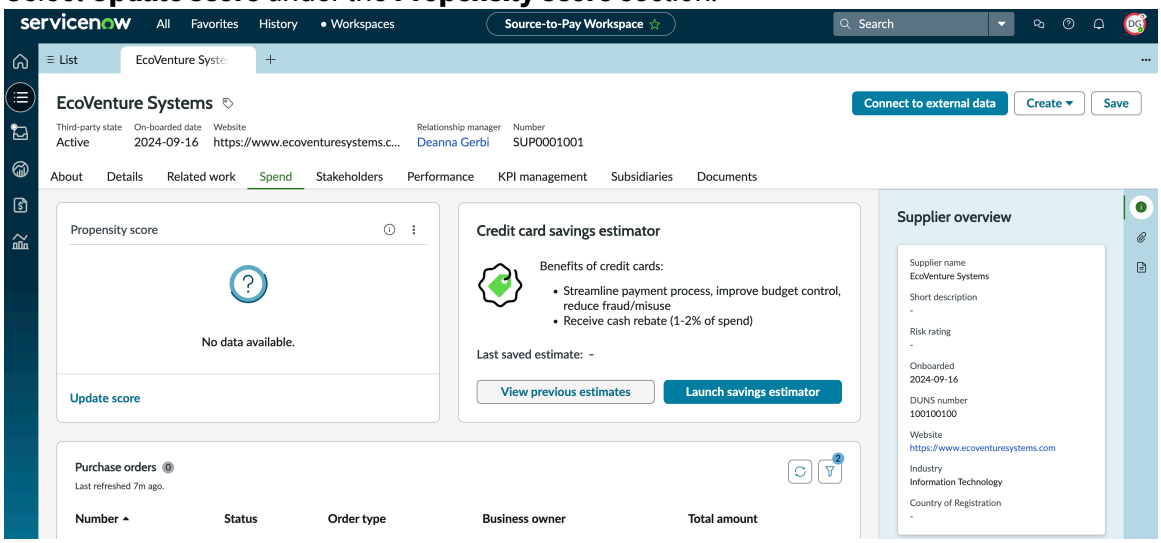
Before you begin

Role required: sn_slm.manager or sn_slm.admin

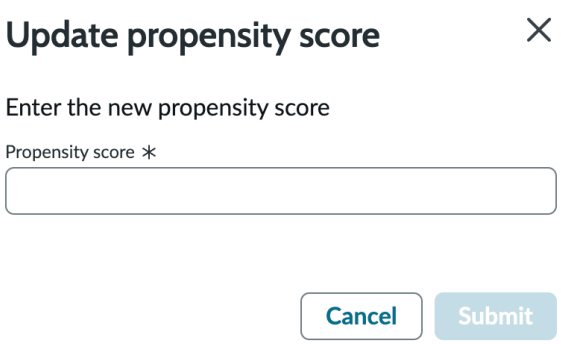
Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Manage my suppliers**.
3. Select the supplier for which you want to estimate the savings (by using credit card payments).
4. Select the **Spend** tab.
5. Select **Update score** under the **Propensity score** section.



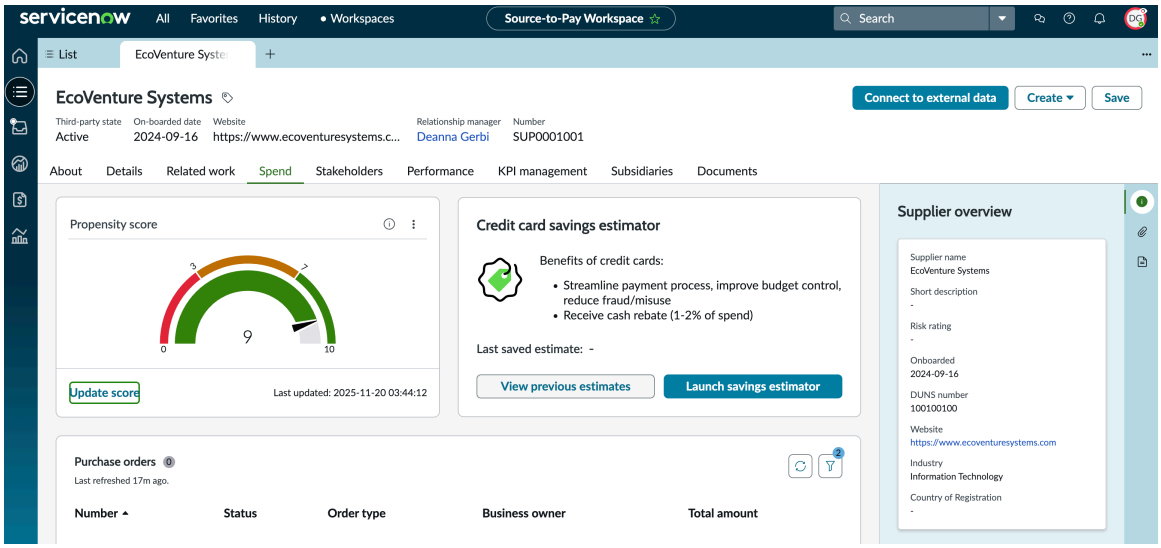
The **Update propensity score** dialog box is displayed.



6. Add the propensity score value between 0-10 (by default, a score of 0–3 indicates low, 4–7 indicates medium, and 8–10 indicates high likelihood).
7. Select **Submit**.

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The propensity score is saved.



Result

The propensity score graph is displayed.

Related topics

Using Supplier Payment Optimization

View the Payment Optimization dashboard

Create a case for supplier credit card enablement

Create a supplier case to request for the credit card information from a supplier.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

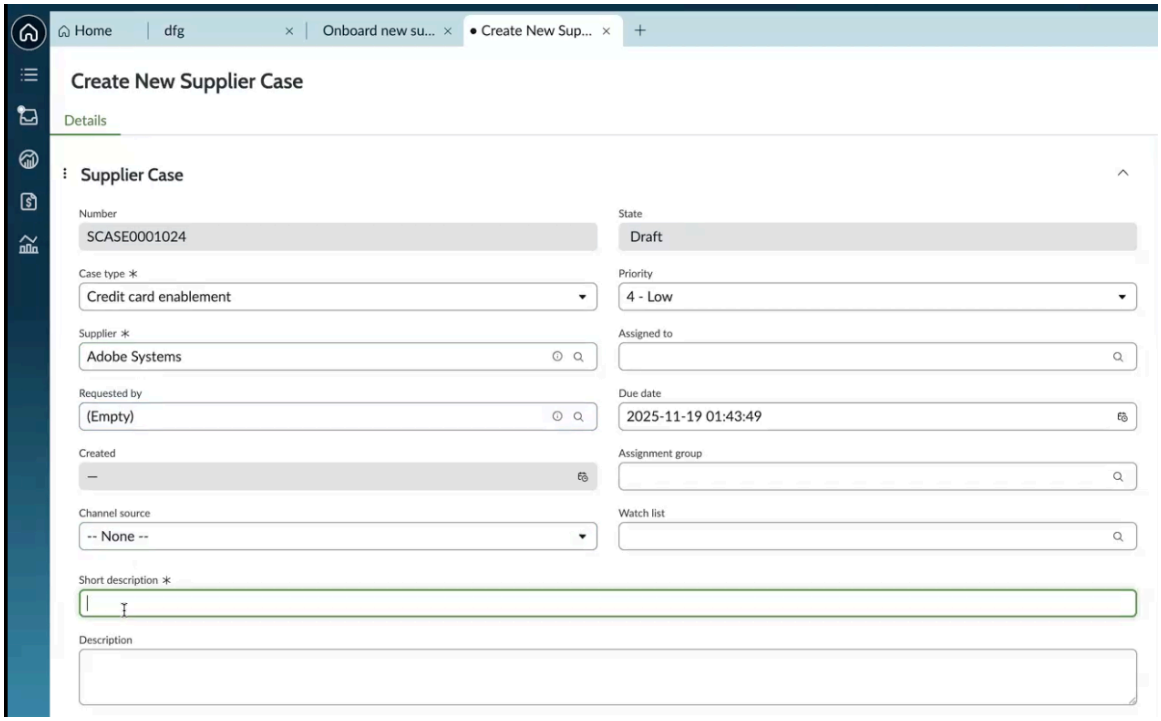
Note: The sn_slm.owner role can create cases only for the suppliers they own.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. On the home page, do one of the following:
   - Under Quick actions, select **Create case**.
   - Under Quick actions, select **Manage my suppliers** and do the following:
     a. Select the link to the supplier name under the Legal name column.
     b. From the **Create** drop-down list, select **Supplier case**.
3. On the Create New Supplier Case form, fill in the fields.

   In the **Case type** field, select **Credit card enablement**.

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For more information about the form fields and descriptions, see Fields in the Create New Supplier Case form.

4. Select **Save**.
   The case is created in Draft state.
5. Select **Submit case**.

Result

The case is created in the **Open** state.

What to do next

After you submit the case, a playbook for this supplier case opens.

For more information, see Supplier credit card enablement playbook.

Related topics

- Using Supplier Payment Optimization
- View the Payment Optimization dashboard
- Case playbook for specific supplier case types
- Estimate savings using the saving estimator tool

Supplier credit card enablement playbook

Source-to-Pay Workspace includes a playbook to complete the supplier cases for initiating credit card acceptance requests.

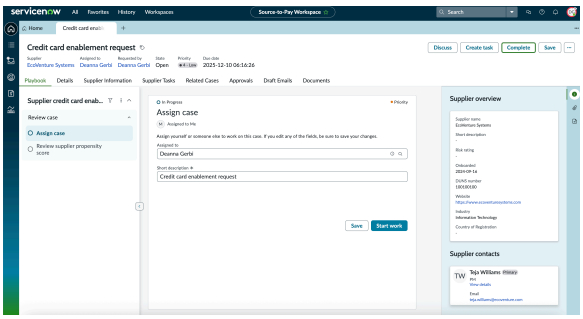
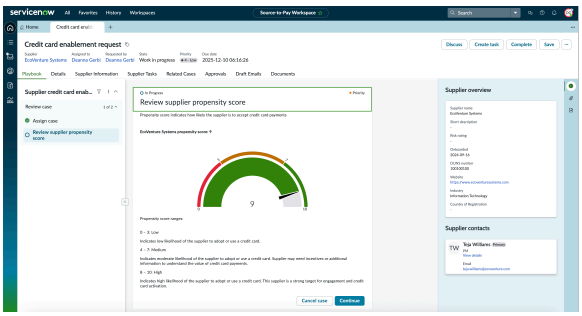
The Supplier credit card enablement playbook provides step-by-step guidance for completing the request. The playbook includes a customized supplier case flow including reviewing the case by checking the propensity score, creating the credit card acceptance task for the supplier contact, and notifying the supplier through email. Once the supplier contact accepts the credit card as the payment method, the case can be closed.

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Supplier credit card enablement playbook stages and activities

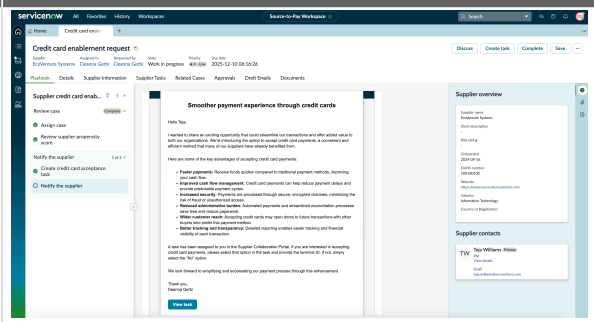
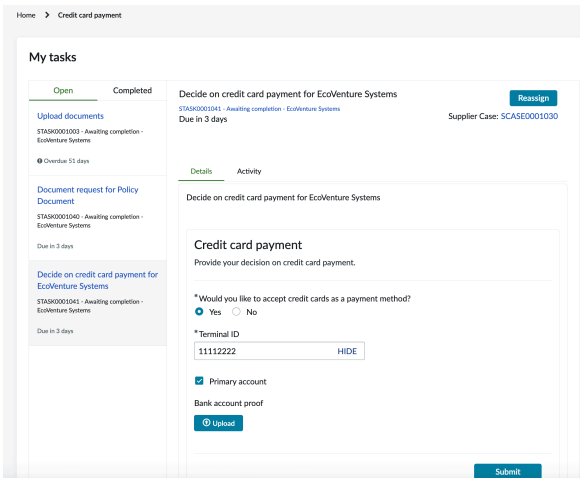
The playbook contains the following stages and activities.

Stages in the Supplier credit card enablement playbook

Stage	Activity	Activity Details
Review the case	Assign case	As a supplier manager or fulfiller, you can assign the case to a different person or keep the case assigned to you. You can do the following: **1.** In the **Assigned to** search field, search for and select the person that you want to assign the case to. **2.** In the **Short description** field, update the description for the case. **3.** Select one of the following actions: ○ Select **Save** to save your changes. ○ Select **Start work** to start working on the case. 
	Review supplier propensity score	As a supplier manager or fulfiller, you can approve or cancel the case after reviewing the propensity score available for this supplier. 
Notify the supplier	Create credit card acceptance task	A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text informing them about the benefits of accepting credit card payments. Ensure that the email template remains editable.

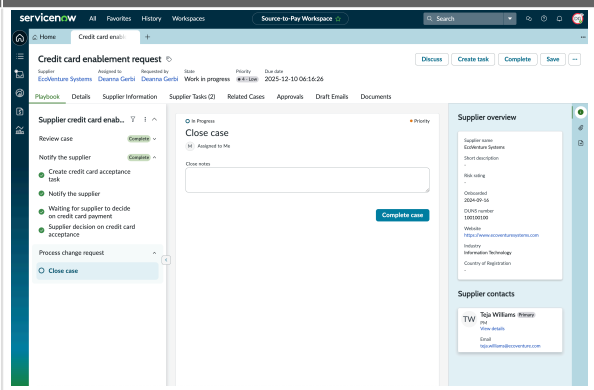
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Stages in the Supplier credit card enablement playbook (continued)

Stage	Activity	Activity Details
		 **Note:** Do not modify the task button, as any changes may cause the link to stop functioning.
	Notify the supplier	Send an email to the supplier informing that the credit card acceptance request has been initiated. Once the email is sent, a task is created for the supplier contact to review and approve the credit card acceptance request.
Waiting for the supplier to decide on credit card acceptance	Check the status	The supplier contact reviews and approves the credit card acceptance request from the Supplier Collaboration Portal after providing the terminal ID and uploading the bank account proof document. 
Process change request	Close case	You can select **Mark complete** and **Complete case** to close the request. Updates the case to Closed Completed.

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Stages in the Supplier credit card enablement playbook (continued)

Stage	Activity	Activity Details
		

Related topics

- Manage supplier cases from the Source-to-Pay Workspace
- Configure due dates for supplier cases
- Playbook for updating the supplier primary data
- Create a case on behalf of a supplier from the Source-to-Pay Workspace

Estimate savings using the saving estimator tool

Use the saving estimator tool to calculate potential savings from credit card payments. The tool uses default values and allows users to modify billing cycles and other parameters to create estimates.

https://player.vimeo.com/video/1139080455?h=089cb29e5f&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

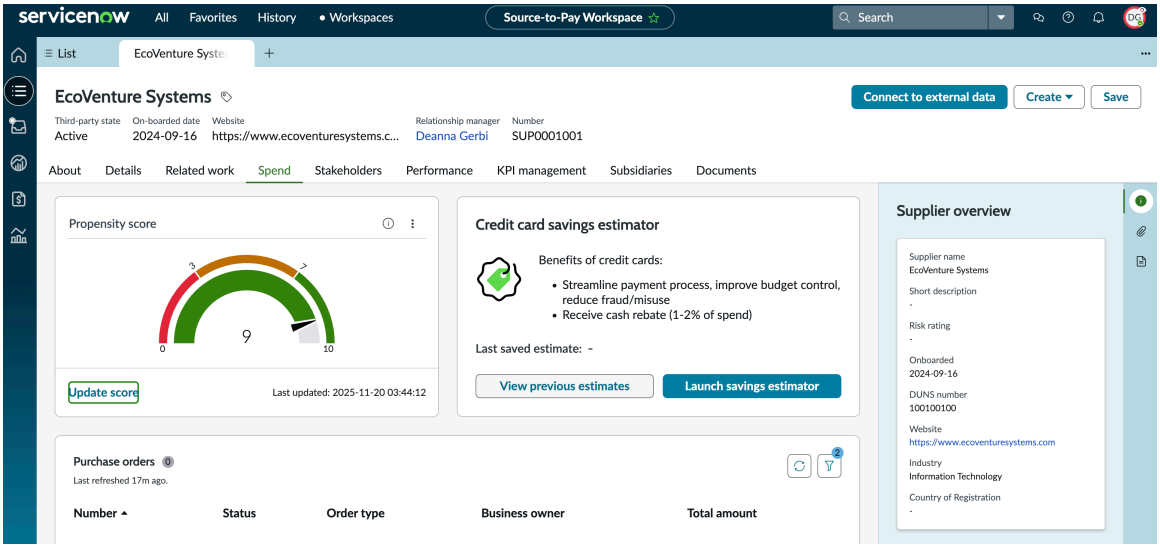
Role required: sn_slm.manager or sn_slm.admin

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

Procedure

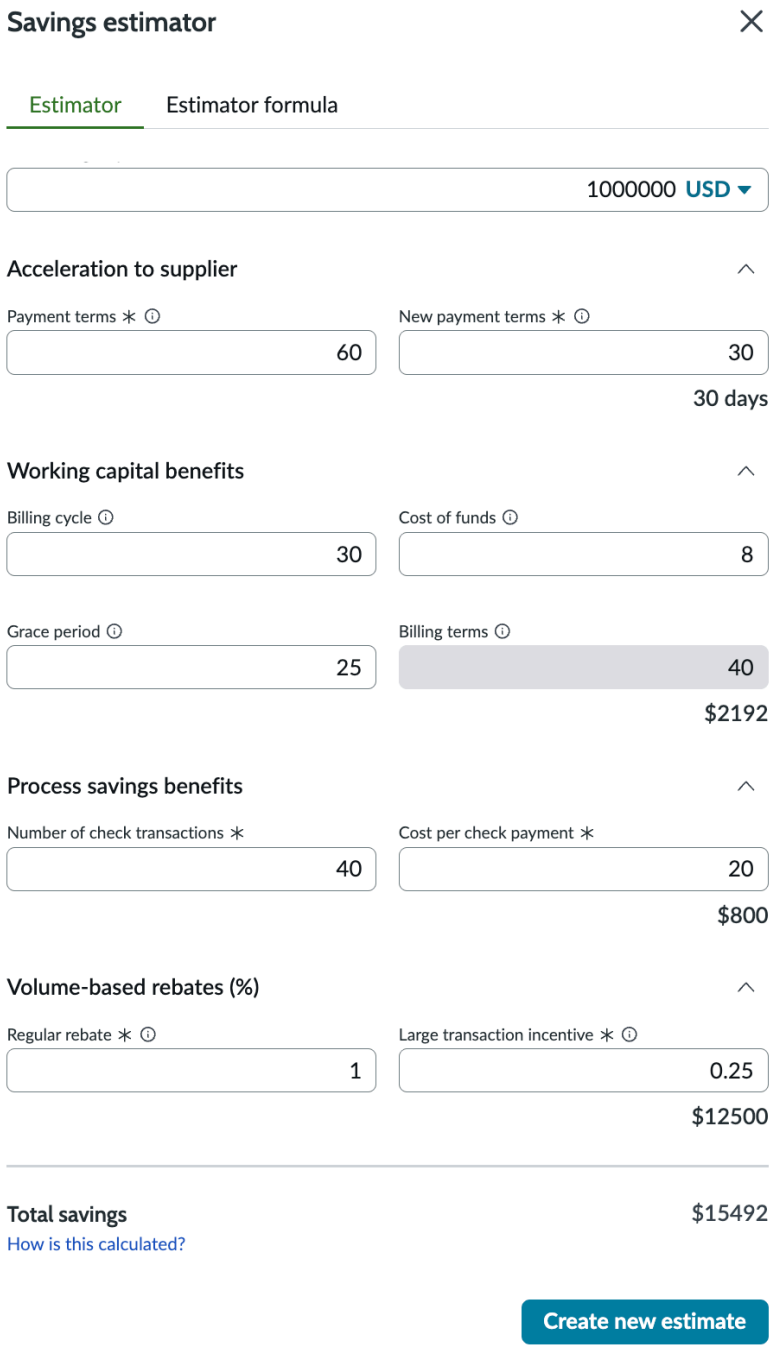
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Manage my suppliers**.
3. Select the supplier for which you want to estimate the savings (by commercial credit card payments).
4. Select the **Spend** tab.
5. Select **Launch savings estimator** under the **Credit card savings estimator** section.

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The **Virtual card value estimator** is displayed.

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You can see the saving calculation formulas by selecting the **Estimator formula** tab.

6. Fill in the form with the required values.
7. Select **Create new estimate**.

   The saving estimate is created and saved. You can select **View saved estimates** to view the list of saved estimates.

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Note: You can modify the saved estimates as required.

Result

The potential savings from credit card payments are displayed.

Related topics

- Using Supplier Payment Optimization
- View the Payment Optimization dashboard

View the Payment Optimization dashboard

The Payment optimization dashboard provides an overview of the total spend and potential savings for all suppliers.

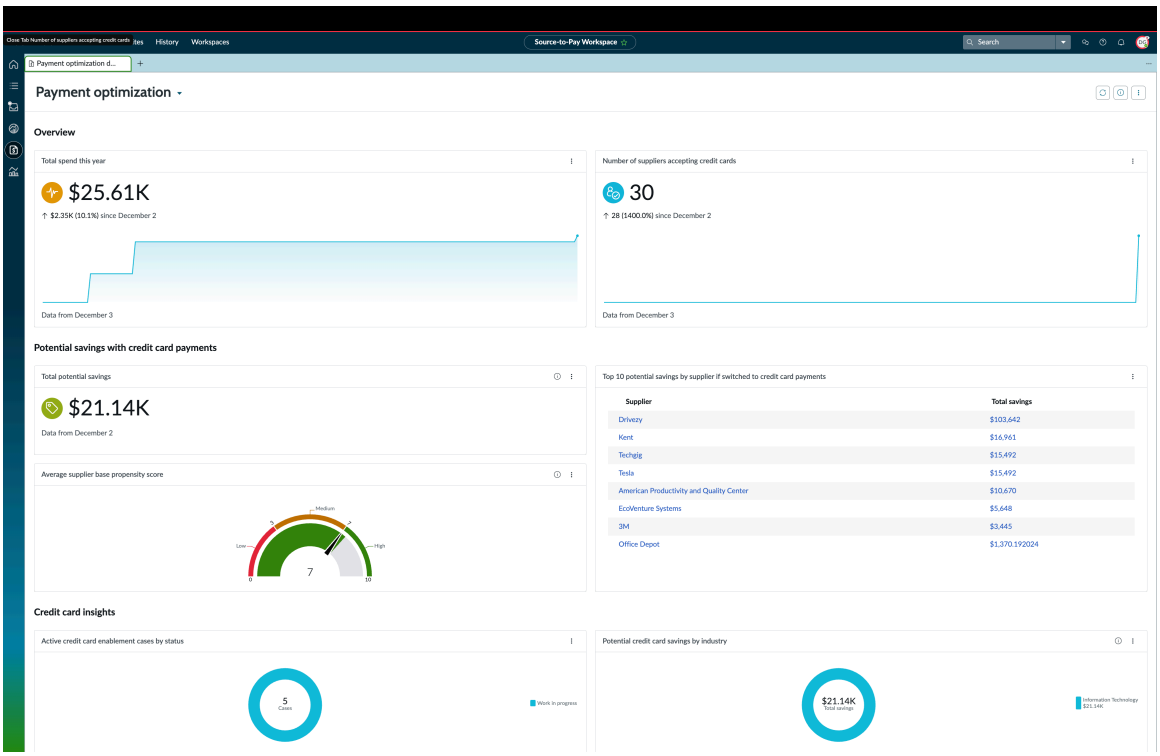
Before you begin

Role required: sn_slm.manager or sn_slm.admin

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the **Payment optimization** icon .



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Result

The Payment Optimization dashboard is displayed. It contains information on the following:

- All time spend and total spend for the current month, quarter, and year.
- Total potential savings and the top 10 supplier opportunities by potential savings.
- Average propensity score of the supplier-base for accepting credit card payments.
- Credit card insights including status of all the active credit card enablement cases and industry-wise potential credit card savings.

Related topics

Using Supplier Payment Optimization

Estimate savings using the saving estimator tool

Supplier Lifecycle Operations reference

Reference topics provide additional information about Supplier Lifecycle Operations, including lists and forms.

Related topics

Primary data tables for Supplier Lifecycle Operations

Supplier Lifecycle Operations data model

Supplier Relationship and Performance Management reference

Supplier Payment Optimization reference

Fields in the 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:

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Create New Supplier Case form (continued)

Field	Description
	• **Supplier support request** • **General inquiry** • **Banking information change request** • **Supplier information change request** • **Supplier location change request** • **Tax information change request** • **Supplier issue** • **Due diligence** • **Offboard a supplier** • **Conduct sanction screening** • **Credit card enablement**
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.
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.

Related topics

Create a case on behalf of a supplier from the Source-to-Pay Workspace

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Fields in the 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: • **Mark complete** • **Play video** • **Upload documents** • **View link**

Related topics

Create a task for a supplier case from the Source-to-Pay Workspace

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**

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Details tab of the task form (continued)

Field	Description
	• **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.
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.

Related topics

Create a task for a supplier case from the Source-to-Pay Workspace

Fields in the 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.

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Add New Location form (continued)

Field	Description
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.

Related topics

Add a supplier location from the Source-to-Pay Workspace

Fields in the Update banking details form

Use the Update banking details form to update the banking details of the supplier.

Update banking details form

Field	Description
Bank Name	Name of the bank.
Primary account	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.

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Update banking details form (continued)

Field	Description
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.

Related topics

Update banking details using the supplier catalog

Fields in the 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.
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:

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Update profile details form (continued)

Field	Description
	• **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.

Related topics

Update company profile using the supplier catalog

Fields in the 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.

Fields in the Create New Documents form

Use the Create New Documents form to provide details about the new document you want to create.

The Create New Documents form contains the Documents and Access Settings sections. For more information about document access settings, see Document security and access.

Create New Documents form

Field	Description
Documents	
Name	Name of the document.
Owner	Name of the document owner.
Reviewers	Name of the document reviewers, if any.
Template	Option to determine whether the document is a template.
Department	Name of the department that created the document.

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Create New Documents form (continued)

Field	Description
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.

Related topics

Manage documents from the Source-to-Pay Workspace

Primary data tables for Supplier Lifecycle Operations

The primary data tables for Supplier Lifecycle Operations store important information about suppliers, supplier contacts, supplier email domains, product codes, supplier locations, and supplier payment information.

Supplier table

The Supplier [sn_fin_supplier] table stores important information about a supplier.

Supplier [sn_fin_supplier] table

The Supplier [sn_fin_supplier] table contains the following fields.

Supplier table

Field	Data type	Description
Legal Name	String	Legal name of the supplier that corresponds to its operating location.

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Supplier table (continued)

Field	Data type	Description
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 (top-level entity of the supplier's corporate group). **Note:** In contrast, Related company is a reference to the company record most relevant to this supplier for risk management and reporting purposes, often a child entity.
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.

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Supplier table (continued)

Field	Data type	Description
ERP source	String	ERP source used by the organization.
Parent entity	String	Parent organization of the supplier.
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.

For more information, see Supplier Lifecycle Operations data model.

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.

For more information, see Supplier Lifecycle Operations data model.

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.

For more information, see Supplier Lifecycle Operations data model.

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.

Note: 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.

For more information, see Supplier Lifecycle Operations data model.

Product Code table

The Product Code [sn_slm_product_code] table stores important information about a product's Universal Product Code (UPC).

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Product Code [sn_slm_product_code] table

The Product Code [sn_slm_product_code] table contains the following fields.

Product Code table

Field	Data type	Description
Name	String	Unique name for the product code.
Level	List	The level of the product. The choices are: • 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

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Supplier Location table (continued)

Field	Data type	Description
		• Invoice address • Service center

For more information, see Supplier Lifecycle Operations data model.

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.

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Supplier Payment Information table (continued)

Field	Data type	Description
Account number	Password2	Account number of the beneficiary.

For more information, see Supplier Lifecycle Operations data model.

Domain separation and Supplier Lifecycle Operations

Domain separation is unsupported for Supplier Lifecycle Operations . Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

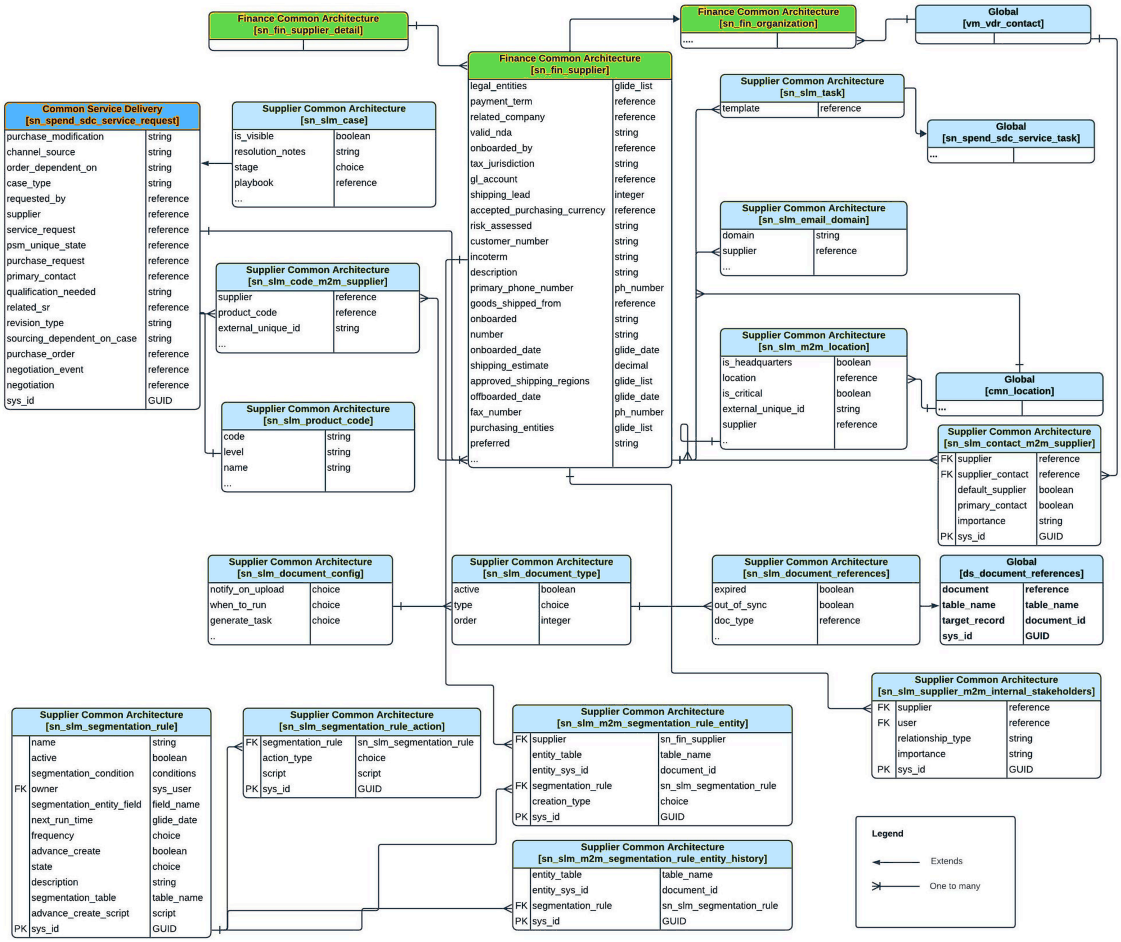
Domain separation for service providers

Supplier Lifecycle Operations data model

The following diagram shows the tables and their relationships that comprise the Supplier Lifecycle Operations data model.

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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.

Important: Check your entitlements to determine whether you have access to Supplier Relationship and Performance Management.

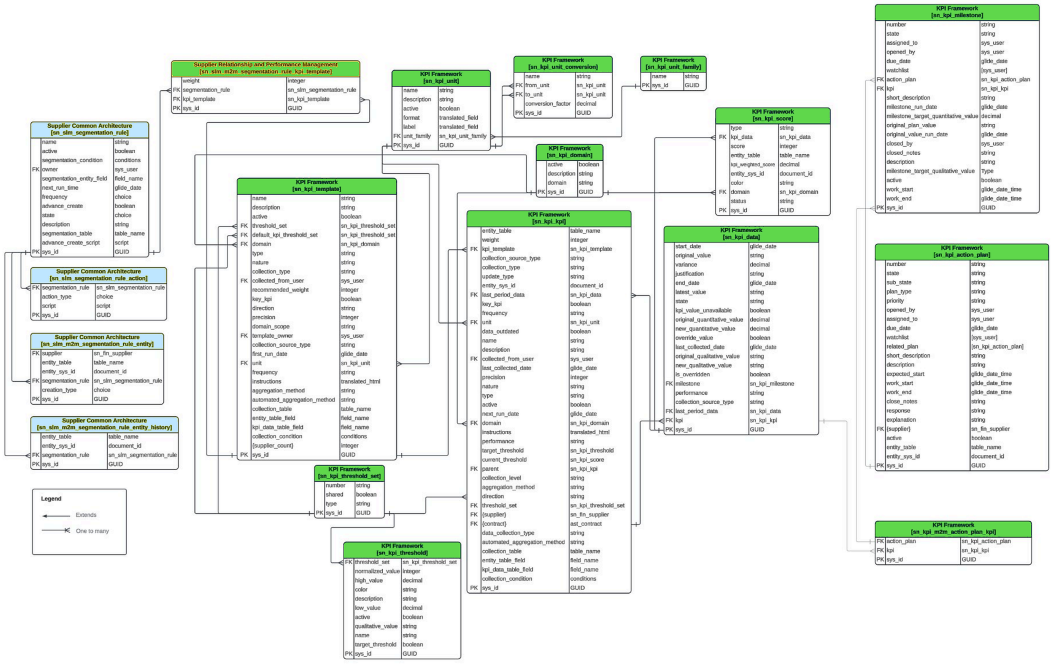
Supplier Relationship and Performance Management data model

The following diagram shows the tables and their relationships that comprise the Supplier Relationship and Performance Management data model.

Important: Check your entitlements to determine whether you have access to Supplier Relationship and Performance Management.

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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.
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.

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KPI Template table (continued)

Field	Data type	Description
Supplier count	Integer	Total number of suppliers added to the KPI template.
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 method used to collect KPI data. Options include Automated, Manual, and Integration. The Integration option enables automated data retrieval from external sources.
External source	Reference	The external system that provides KPI data when the collection source type is Integration. This field references the ERP source table. For FedEx DataWorks integration, this field must be populated with FedEx DataWorks. This field is hidden by default on the KPI template form.
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.

Related topics

Create manual KPI templates

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.

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KPI table (continued)

Field	Data type	Description
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.
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 method used to collect KPI data. Options include Automated, Manual, and Integration. The Integration option enables automated data retrieval from external sources.
External source	Reference	The external system that provides KPI data when the collection source type is Integration. This field references the ERP source table. For FedEx DataWorks integration, this field is populated with FedEx DataWorks. This field is hidden by default on the KPI form.
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.

Related topics

Create KPIs without using KPI template

Create KPIs by adding suppliers to a KPI template

KPI Data table

The KPI [sn_kpi_data] table stores the collected data for all the KPIs.

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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.
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.
External source	Reference	The external system that provides KPI data when the collection source type is Integration. This field references the ERP source table. For FedEx DataWorks integration, this field is populated with FedEx DataWorks. This field is hidden by default on the KPI data form.

Related topics

- Create KPIs without using KPI template
- Create KPIs by adding suppliers to a KPI template

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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.
Active	Boolean	Indicates whether the KPI performance domain record is active. This option is enabled by default.

Related topics

Create KPI performance domains

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.

Related topics

Create KPI units

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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.
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.

Related topics

Create KPI thresholds

Restructured Supplier Task table

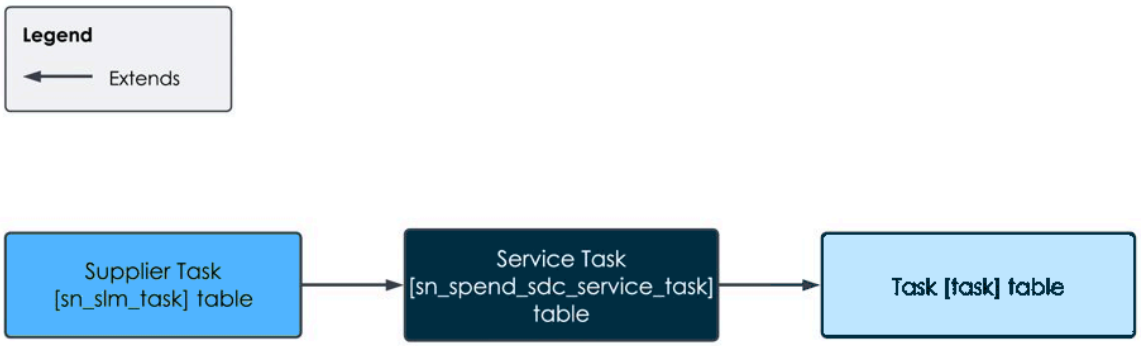
The Supplier Task table architecture has been restructured in the Washington DC and Yokohama releases.

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.

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Supplier Task table structure



After you upgrade to the Yokohama release, a new field **KPI Instruction** is added in the Supplier Task table. To update the **KPI Instruction** field, run the fix script SLO - Feb 25 data script.

Related topics

- Run fix script to update the KPI Instruction field in the Supplier Task table
- Run fix script to migrate existing data from the deprecated Action type column after upgrade
- Run fix script to use the Supplier Manager Workspace after upgrading to the Brazil release
- Enable deprecated case types after upgrade

Supplier Payment Optimization reference

Reference topics provide additional information about Supplier Payment Optimization, including its data model and primary table.

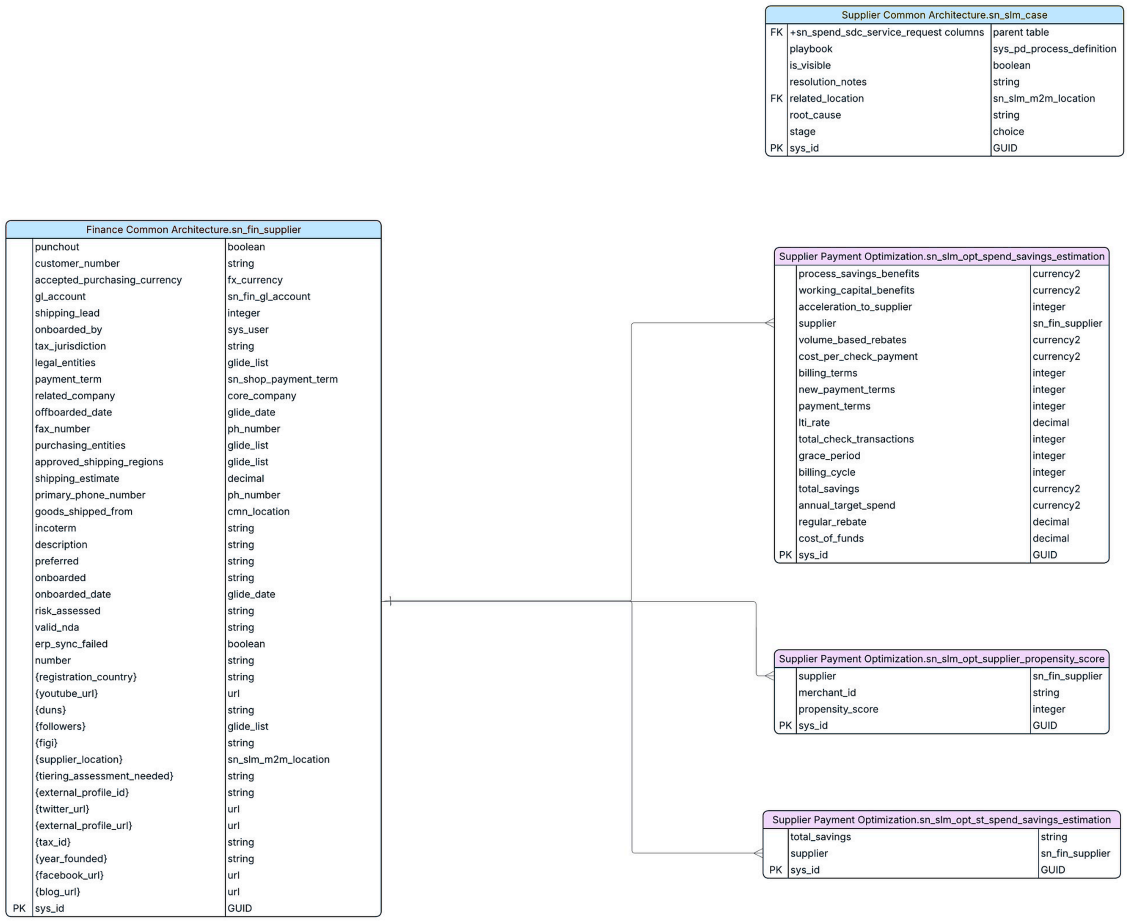
Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

Supplier Payment Optimization data model

The diagram shows the tables and their relationships that comprise the Supplier Payment Optimization data model.

Important: Check your entitlements to determine whether you have access to Supplier Payment Optimization.

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Spend Savings Estimation table

The Spend Savings Estimation [sn_slm_opt_spend_savings_estimation] table stores the saving estimates generated by the saving estimator tool.

Spend Savings Estimation [sn_slm_opt_spend_savings_estimation] table

The Spend Savings Estimation [sn_slm_opt_spend_savings_estimation] table contains the following fields.

Spend Savings Estimation table

Field	Data type	Description
Supplier	Reference	Name of the supplier.
System domain	Domain ID	Identifier for the system domain associated with the supplier.
System domain path	String	Path that indicates the hierarchy or structure of the system domain.
Annual target spend	Currency	Total amount expected to be spent in an year with the supplier.
Payment terms	Integer	Number of days taken to pay the supplier using current method.

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Spend Savings Estimation table (continued)

Field	Data type	Description
New payment terms	Integer	Number of days it will take to pay the supplier using the new method (usually card).
Acceleration to supplier	Integer	Number of days reduced by paying the supplier using the new method.
Grace period	Integer	Number of days after the billing cycle closes before you must pay the card bill.
Billing terms	Integer	Internal setting or max deferral window — often used as a cap for payment timing (ex: billing cycle + grace period or a set maximum).
Working capital benefits	Currency	Estimated financial benefit gained by extending the time between paying the supplier and paying the card issuer.
Billing cycle	Integer	Number of days in the card billing cycle (from transaction date to statement date).
Cost of funds	Decimal	Organization's internal cost (in percentage) for borrowing the funds needed to purchase goods or services from the supplier.
Total check transactions	Integer	Total number of transactions currently processed through checks.
Cost per check payment	Currency	Average processing cost per check payment (default value: 20).
Process savings benefits	Currency	Total process cost savings from switching from traditional check payments to virtual card payments.
Regular rebate	Decimal	Fixed rebate percentage offered by the card provider.
Iti rate	Decimal	Interchange Transfer Incentive rate: Additional rebate or incentive offered based on volume or card type.
Volume based rebates	Decimal	Total rebates earned based on the payments made through the virtual card.
Total savings	Currency	Total savings earned from process savings, working capital, and earned rebates.

For more information, see Supplier Payment Optimization data model.

Supplier Lifecycle Operations glossary

Learn about the terms and concepts used in Supplier Lifecycle Operations (SLO).

Glossary terms are grouped alphabetically.

A | C | I | M | N | O | P | R | S | |

A

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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.io integration for Supplier Lifecycle Operations

Provides integration with Craft.io, 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.

M

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.

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.

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.

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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. This interface enables self-service, direct collaboration, and management of supplier-related tasks and information.

supplier contact

The person who allows individuals from the supplier side to access the Supplier Collaboration Portal, manages tasks, and interacts with the buying organization.

supplier document configuration

The supplier document configurations that detail when and how documents should be managed and notified.

supplier document management

The functionality that enables you to manage supplier-related documents, including creating and running a supplier document configuration that is required to upload the prerequisite documents.

supplier fulfiller

The person who is responsible for fulfilling tasks and cases that are 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

The person who is responsible for managing supplier relationships, overseeing supplier onboarding, tracking cases and tasks, and conducting supplier risk assessments.

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supplier offboarding

The process of discontinuing a business relationship with a supplier. Tasks include deleting the supplier primary data, settling accounts, and deactivating the access to your systems.

supplier onboarding

The process of registering, qualifying, and activating suppliers to do business with the organization.

supplier owner

The person who is responsible for the ownership and management of specific suppliers, including the ability to update supplier information and manage related cases and tasks.

Supplier Relationship and Performance Management

The Supplier Relationship and Performance Management (com.snc.sn_slm_perf) application that enables you to establish clear expectations and criteria for measuring supplier performance, monitoring and assessing their performance against those criteria, providing feedback and recognition, and implementing corrective actions and improvement plans when needed.

supplier task

A task that is created in the Source-to-Pay Workspace and assigned to the contacts of the internal users or suppliers so that they can take action and complete that task.

Accounts Payable Operations

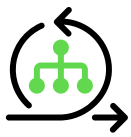
The ServiceNow® Accounts Payable Operations application enables you to efficiently manage invoices, invoice exceptions, invoice approvals, and supplier inquiries.

This video provides a visual overview of Accounts Payable Operations and its key capabilities.

https://url.us.m.mimecastprotect.com/s/m4JWCDkVqEiOXA3rlHWfAHjbv13?domain=player.vimeo.com

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.

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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:

Release Notes

Learn more about what's new and changed. See the https://www.servicenow.com/docs/access?context=accounts-payable-operations-static-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as Accounts Payable Operations (APO) Implementation Essentials 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

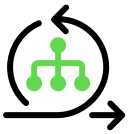
Connect with other Accounts Payable Operations users at ServiceNow Community.

ServiceNow Otto for Accounts Payable Operations (APO)

ServiceNow Otto for APO uses generative AI to help AP fulfillers summarize cases, extract invoice data, and map PO lines.

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Get started

Explore	Configure	Use
		
Learn more about ServiceNow Otto for APO	Configure the ServiceNow Otto for APO application to get started	Use the generative AI capabilities that are offered by ServiceNow Otto for APO

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI 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 AI 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 AI 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. Furthermore, 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. 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.

Explore ServiceNow Otto for Accounts Payable Operations (APO)

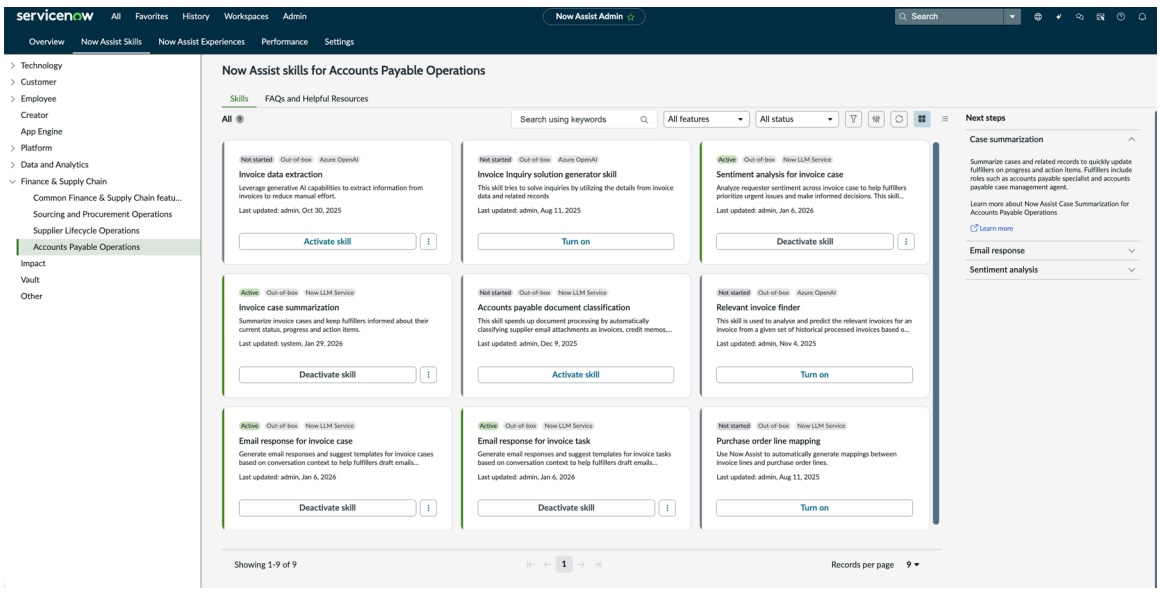
ServiceNow Otto for Accounts Payable Operations (APO) provides AP fulfillers with generative AI skills to summarize invoice cases, extract invoice data, map purchase order lines, and generate inquiry resolutions.

ServiceNow Otto for APO overview

Using the summarization capability of the ServiceNow Otto for APO application, an AP fulfiller can auto-map invoice lines with purchase order lines. You can get a concise summary of a case quickly, extract invoice details from email, and auto-create an invoice processing case.

Cases can be complex and a case summary may enable an AP fulfiller to provide a more concise summary.

Skills



The ServiceNow Otto for APO application includes the following:

- The generative AI skills enable an AP fulfiller to extract the details of an invoice case or inquiry case and suggest resolutions.
- The generative AI skills perform the purchase order line-mapping and enable an AP fulfiller to review the mapping results.

Purchase order line mapping

Provides AP fulfiller to automatically map the invoice lines with the purchase order lines.

The purchase order line-mapping skill generates the invoice line mapping and changes the invoice line status to review mapping state. The fulfiller can then

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manually review the mapping results. After the fulfiller reviews the mapping results, the invoice line status is changed to mapping complete. The purchase order lines mapped using the AI skill are controlled using the APO properties. For more information on the use of purchase order mapping in workspace, see Set APO properties and Using Playbook in Accounts Payable Operations.

Invoice case summarization

The summary skill reviews the issue, actions completed, status, and next steps. An AP fulfiller can refresh the summary as case updates happen and post the summary to work notes.

The invoice case summary displays above the activity stream.

For invoice processing cases, the summary skill also reviews the invoice status and invoice information located in the applicable document.

For inquiry cases, the invoice case summarization skill generates a case summary by checking the short description, description, and tasks that were created for the case.

Fulfiller can customize prompt configuration and prompt optimization using the pre-processor in the AI skill kit. The skill supports multiple models such as OpenAI, Claude, Gemini, Now LLM Service. The configured pre-processor is applied across all supported models in NASK. To customize the prompt instructions, the sn_skill_builder_admin role is mandatory.

Invoice data extraction

The Invoice data extraction skill helps in extracting invoice details from PDFs submitted through email or supplier portal. The digitized invoice is processed within Accounts Payable Operations automatically. Invoices are extracted in languages (English, Dutch, French, German, Japanese, Italian, Portuguese, Spanish) supported by GPT-4o.

With the Invoice data extraction skill, customers can achieve higher invoice extraction accuracy by leveraging GPT-4o and significantly reducing manual effort. Customers are provided with the flexibility of turning on the manual review of extraction results or can let invoice be processed through the workflow automatically without manual review.

Invoice inquiry solution generator

The Invoice inquiry solution generator skill identifies, extracts the invoice inquiry details from the invoice data and related records. Automates the resolution for invoice inquiry cases.

The skill suggests appropriate resolutions for inquiry cases by analyzing case details such as description, short description, related tasks and knowledge articles.

Resolve supplier questions use case uses the field extractor skills, which extracts the invoice number and supplier (from the description and short description) and updates the case. The inquiry classifier categorizes the case by reading description, short description and updates the subcategory in the case. The Inquiry resolution provider agent automatically provides resolution for the inquiry submitted by suppliers or employees. The agent analyzes the invoice, invoice lines, and other invoice-related tables (tax, exceptions, approval history tables, purchase order tables, and knowledge base tables).

The skill is activated upon assignment of an inquiry case to an AP agent. The Inquiry resolution provider AI agent uses the skill to generate invoice inquiry case resolution in the ServiceNow Otto panel. An agent reviews the resolution in the

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ServiceNow Otto panel. The agent is prompted with an input to close the case in the ServiceNow Otto panel. Upon confirmation, the case is closed with the appropriate closure code and closure details. If the agent chooses to respond with a "No", then the ServiceNow Otto panel chat window is terminated for manual closure. The resolution is updated in the activity history (work notes) of the case. For more information on the AI agent, see Inquiry resolution provider AI agent.

Relevant invoice finder

The Relevant invoice finder skill identifies the historically processed invoices that are most relevant to a given invoice using semantic matching.

The skill compares the current invoice and its line descriptions with previously processed invoices and their line descriptions. It generates a relevance score from 0 through 1 for each item. These invoices are then returned in a ranked list, ordered by relevance.

The Recommend invoice owner AI agent uses this match score to suggest a resolution plan for Missing or invalid business owner exceptions.

Email response for invoice case

The Email response for invoice case skill generates responses for email by analyzing invoice case contexts, activity, work notes, invoice details, approvals, payments, fulfiller's response in the past and knowledge base articles. The skill enables AP specialists and agents to automatically draft and manage responses to invoice-related inquiries. It also leverages the templates in drafting email responses.

The skill reduces time spent by AP specialists and agents in manually drafting responses and improves productivity.

Email response for invoice task

The Email response for invoice task skill generates responses for email by analyzing invoice case contexts, activity, work notes, invoice details, approvals, payments, fulfiller's response in the past and knowledge base articles. The skill enables AP specialists and agents to automatically draft and manage responses to invoice-related inquiries. It also leverages the templates in drafting email responses.

The skill reduces time spent by AP specialists and agents in manually drafting responses and improves productivity.

Sentiment analysis for invoice case

The Sentiment analysis for invoice inquiry case skill enables fulfiller to analyze and prioritize the invoice inquiry cases based on the response tone. The tone is categorized as positive, negative, or neutral. The sentiment score helps fulfiller to understand the urgency and emotional weight of the invoice inquiry case.

Accounts payable document classification

The Accounts payable document classification skill automatically identifies and categorizes supplier sent email attachments as invoice, credit memo, and supporting documents. The system supports configurable confidence thresholds and an AI solution with confidence score. Documents are auto-approved if the AI-confidence score is greater than the configured threshold, and auto-approval is enabled in the APO properties page. AP specialist manually reviews the document if the AI confidence score is lesser than the configured threshold. After the documents are successfully categorized, the invoice data extraction skill triggers the extraction of invoices.

If the email contains more than one invoice or credit memo, the system handles them as follows:

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- The first invoice is processed using the parent case.
- For each additional invoice or credit memo, the system creates a separate invoice processing case. These cases are available under the **Linked Cases** related list on the parent case.
- All supporting documents are automatically copied to both the parent case and each linked case, ensuring every case has the context it needs for processing.
- **Supporting documents only**: If no invoices or credit memos are found, you can either cancel the case or convert it into an inquiry case.

This skill accelerates invoice processing and manages substantial volumes of data across various formats, thereby reducing errors, enabling audit transparency, and eliminating manual intervention. The AI solution accurately classifies document types prior to invoice extraction, confirming that non-invoice documents such as contracts and receipts aren't inadvertently processed as invoices. For more information on configuring the skill, see Configure Accounts payable document classification skill.

Related topics

Invoice Processing use case

Configuring the invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence

Invoice Case Management

Supporting information for ServiceNow Otto for Accounts Payable Operations (APO)

Supporting information for ServiceNow Otto for Accounts Payable Operations (APO) includes prerequisites, skill configurations, and related resources.

Supported versions

The ServiceNow Otto for APO application is supported starting with Brazil.

Supported user interfaces

The ServiceNow Otto for APO application includes the skills that are listed in the following table.

ServiceNow Otto for APO supported interfaces

Interface	Skill
Virtual Agent	• Conversational interface in Now Assist in Virtual Agent. • Track request status
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 ServiceNow Otto for APO store app (sn_ap_gen_ai) to use the Case summarization skills.

This store app has the following dependencies:

ServiceNow Otto for Platform (com.sn.now.platform)

Activate the applications in the following order:

1. ServiceNow Otto for Platform (sn_genai_platform)
2. ServiceNow Otto for APO (sn_ap_gen_ai)

For more information, see Configure ServiceNow Otto for Accounts Payable Operations (APO).

Configure ServiceNow Otto for Accounts Payable Operations (APO)

Configure ServiceNow Otto for Accounts Payable Operations so that AP fulfillers can use generative AI skills in the Source-to-Pay Workspace and in Core UI.

APO configuration overview

- AI Admin Hub

  Use the AI Admin Hub 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 Admin features topic.

  Use the AI Admin Hub console to activate the various ServiceNow Otto applications and skills that you're entitled to.

The following table lists the features and skills that you can access from the AI Admin Hub console.

APO features and skills in the AI Admin Hub console

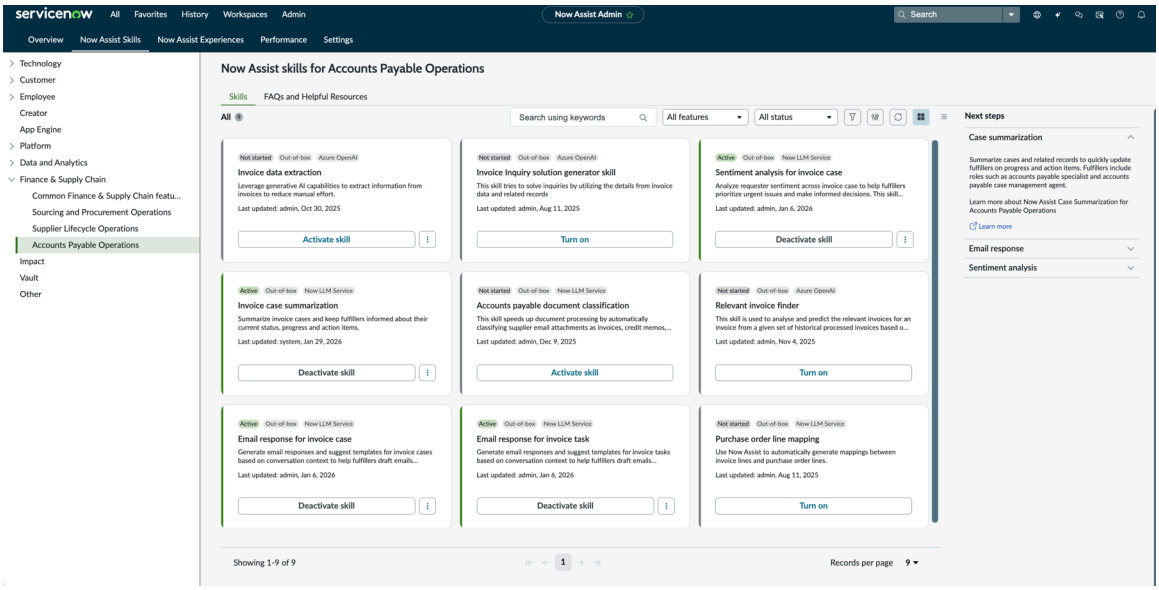
APO features	Skills
Purchase order line mapping	Purchase order line mapping with invoice line mapping
Case summarization	Invoice case summarization
Invoice data extraction	Invoice data extraction using DocIntel
Invoice inquiry solution generator	Identify, extract the invoice inquiry details from the invoice data and related records.
Sentiment analysis for invoice case	Analyze and prioritize the invoice inquiry cases based on the response tone.
Accounts payable document classification	Automatically identifies and categorizes supplier sent email attachments as invoice, credit memo, and supporting documents.
Relevant invoice finder	Identify the historically processed invoices that are most relevant to a given invoice using semantic matching.

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APO features and skills in the AI Admin Hub console (continued)

APO features	Skills
Email response for invoice case	Automatically draft and manage responses to invoice-related inquiries.
Email response for invoice task	Automatically draft and manage responses to invoice-related inquiries.

AI skills for APO



Skill inputs for ServiceNow Otto for Accounts Payable Operations (APO)

Skill inputs for the invoice case summarization skill, including the base input table and fields used to generate invoice case summaries.

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 ServiceNow Otto for Accounts Payable Operations (APO)

The ServiceNow Otto 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 AI Admin Hub console.

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Invoice case summarization skill inputs

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 • Sub category • State • Closed at • Closed by • Closure code • Closure details

Install ServiceNow Otto for Accounts Payable Operations (APO)

Install the APO plugin [sn_ap_gen_ai] to give AP fulfillers access to generative AI skills in Source-to-Pay Workspace and Core UI.

Before you begin

Role required: admin

Install the Document Intelligence for Accounts Payable Operations Content Pack from the ServiceNow® Store for the invoice data extraction skill.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the AI skills in the AI Admin Hub 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.

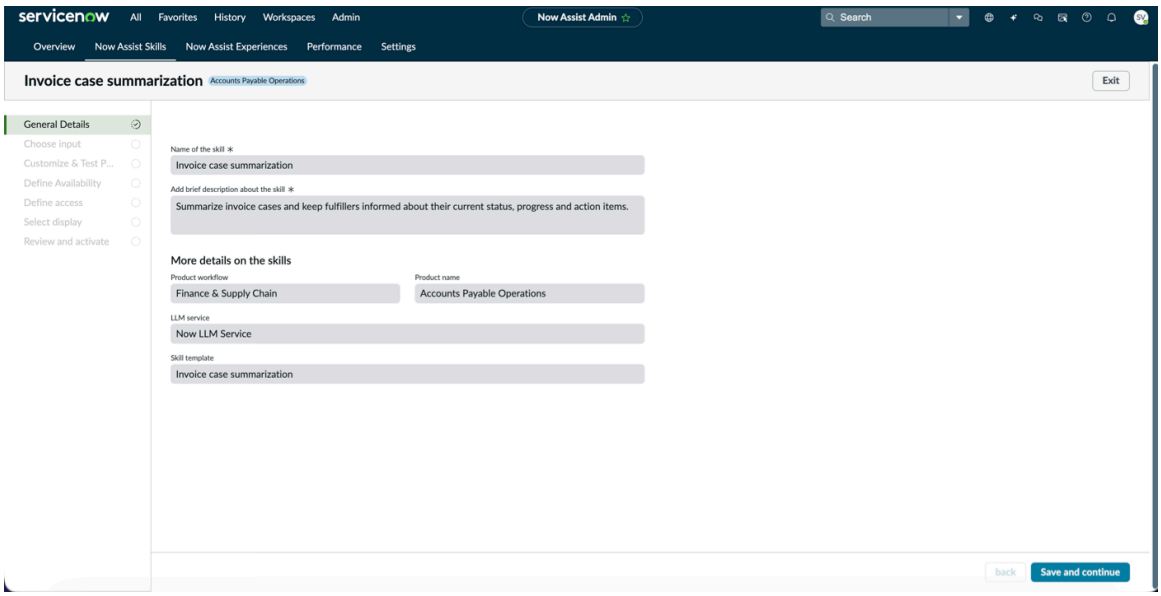
Skills for Accounts Payable Operations

Skills	Action
Purchase order line mapping	To activate the skill, on the Purchase order line mapping skill card, select **Turn on**.

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Skills	Action
Invoice case summarization	On the Purchase order line mapping skill card, select **Activate skill**.
Invoice data extraction	On the Invoice data extraction mapping skill card, select **Activate skill**.
Invoice inquiry solution generator	On the Invoice data extraction mapping skill card, select **Turn on**.
Sentiment analysis for invoice case	On the Sentiment analysis for invoice case skill card, select **Activate skill**.
Accounts payable document classification	On the Accounts payable document classification skill card, select **Activate skill**.
Relevant invoice finder	On the Relevant invoice finder skill card, select **Turn on**.
Email response for invoice case	Automatically turns on.
Email response for invoice task	Automatically turns on.

4. For Invoice case summarization skill:



a. Select **General Details**, review the details about the skill, and then select **Save and continue** to go to the next step.

b. Follow the steps to configure and activate a skill by using the Guided Setup.

c. Select **View Case Input**, review the base input table and input fields, and then select **Save and continue** to go to the next step.

d. **Optional:** To test the prompt on a record, select **Customize and test prompt**.

e. Select **Save and continue** to go to the next step.

f. **Optional:** Select **Define Availability** and choose one of the following options.

Option	Description
Skill is always available	The skill is always available to users.

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Option	Description
Customize skill availability	The skill is available only when the certain conditions are met (default). Use the condition builder to set your condi tions.

a. Select **Save and continue** to go to the next step.

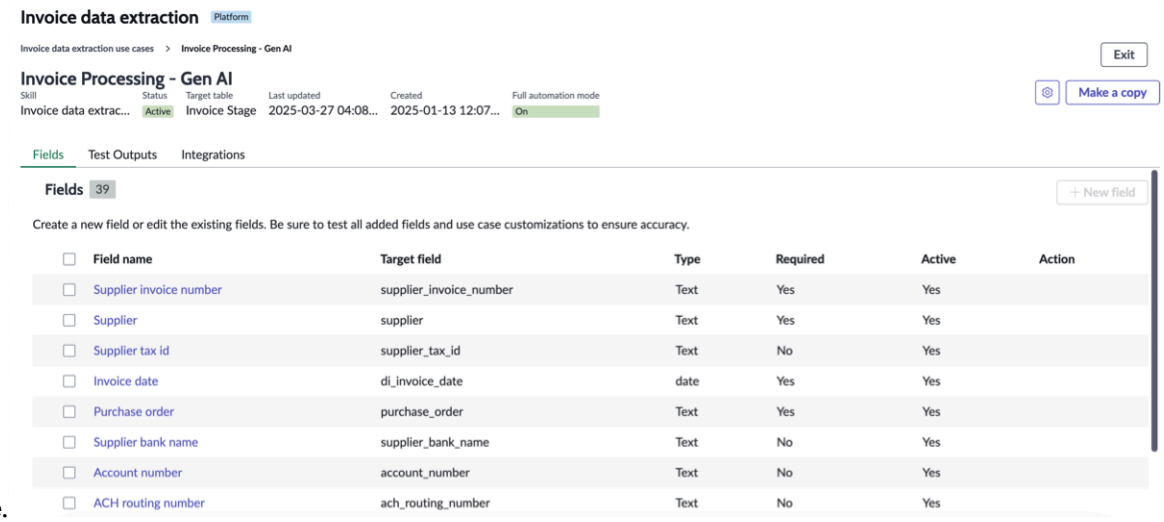
b. Choose **Select display** to determine where you'd like to display the skill.

Option	Description
In-product desktop	AI skills are displayed on forms and work spaces.
panel	AI skills are available in the ServiceNow Ot to Panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more infor mation, see Configure multilingual service for **Note:** If you don't see this option, you must activate the ServiceNow Otto pan el. For more information, see Activate the ServiceNow Otto panel standard

5. Select **Save and continue** to go to the next step.
6. Review your choices and select **Activate** to complete the configuration for the skill.
7. Complete the setup by selecting **Done**.
   The skill is displayed in the Active skills section.
8. In case of Invoice data extraction for the APO specialists feature card, select **Activate skill**.

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a. In the **Create Usecase** step, select the **Invoice Processing - GenAI** use case.



b. Select **Make a copy** to create a copy of the use case.
When you create a copy of the generative AI use case in AI Admin Hub, then "DocIntel Extract Values Flow - copied GenAI use case name-Invoice processing-GenAI integration" use case is created automatically in the flow designer. For more information on configuring the use case, see Configuring the invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence.

c. Select **Save and continue** to go to the next step.

d. In the **Review and activate** step, select **Activate**.

The Invoice data extraction skill is activated.

9. On the Purchase order line mapping summarization for the APO specialists feature card, select **Turn on**.

Result
The generative AI skill auto-generates mappings between invoice lines and purchase order lines.

Configure Invoice case summarization

Enable Accounts Payable fulfillers to use generative AI-powered invoice case summarization to quickly analyze invoice cases and determine next steps.

Before you begin
Role required: admin

Install the Document Intelligence for Accounts Payable Operations Content Pack from the ServiceNow® Store for the invoice data extraction skill.

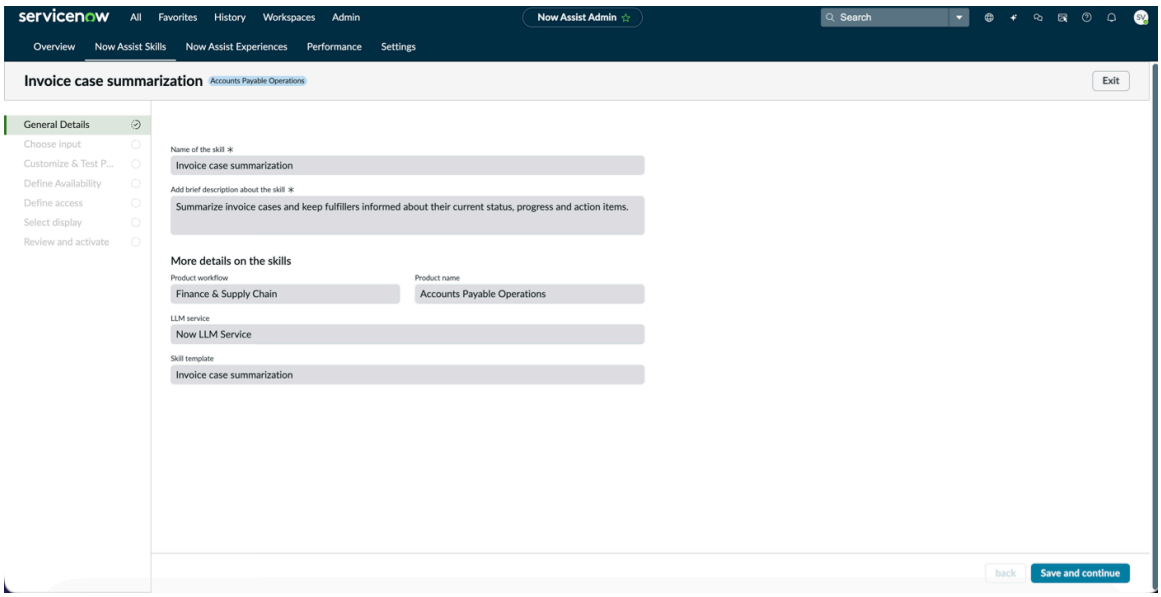
Procedure
1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab of the AI Admin Hub.
2. Expand the **Finance and Supply Chain** workflow group and select **Accounts Payable Operations**.
3. Activate and configure the skills for the APO application.

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Skills for Accounts Payable Operations

Skills	Action
Invoice case summarization	On the Purchase order line mapping skill card, select **Activate skill**.

4. For Invoice case summarization skill:



a. Select **General Details**, review the details about the skill, and then select **Save and continue** to go to the next step.

b. Follow the steps to configure and activate a skill by using the Guided Setup.

c. Select **View Case Input**, review the base input table and input fields, and then select **Save and continue** to go to the next step.

d. **Optional:** To test the prompt on a record, select **Customize and test prompt**.

e. Select **Save and continue** to go to the next step.

f. **Optional:** Select **Define Availability** and choose one of the following options.

Option	Description
Skill is always available	The skill is always available to users.
Customize skill availability	The skill is available only when the certain conditions are met (default). Use the condition builder to set your condi tions.

a. Select **Save and continue** to go to the next step.

b. Choose **Select display** to determine where you'd like to display the skill.

Option	Description
In-product desktop	Now Assist skills are displayed on forms and workspaces.

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Option	Description
ServiceNow Otto panel	ServiceNow Otto skills are available in the ServiceNow Otto panel. Turn on multi-language support for user-entered text with Dynamic Translation in ServiceNow Otto applications. For more information, see Configure multilingual service for ServiceNow Otto applica **Note:** If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard

5. Select **Save and continue** to go to the next step.
6. Review your choices and select **Activate** to complete the configuration for the skill.
7. Complete the setup by selecting **Done**.
   The skill is displayed in the Active skills section.

Result
The Invoice case summarization skill is activated.

What to do next
Summarize a record by using ServiceNow Otto for Accounts Payable Operations (APO)

Configure Document Intelligence using ServiceNow Otto for Accounts Payable Operations (APO)

Configure Document Intelligence using AI skills in Accounts Payable Operations to enable AI-powered invoice data extraction.

Before you begin
Role required: admin

Scope: Accounts Payable Operations with Document Intelligence.

Plugins required:

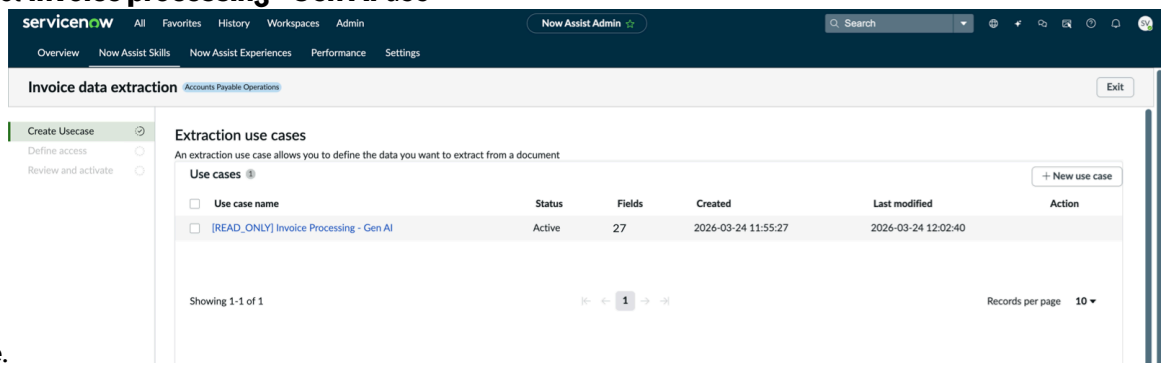
- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. Select **Finance and Supply Chain** > **Accounts Payable Operations** > **Invoice data extraction** to view the skills for the APO features.
3. Select **Activate** the skill.
   The **Invoice processing - Gen AI** use case is provided as out of the box within the skill.

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4. Select **Invoice processing - Gen AI** use case.



5. Select **Save and Continue**.
6. In the **Review and activate** section, select **Activate**.

Result

DocIntel configured using the **Invoice data extraction** skill is activated successfully.

What to do next

Copy and activate the generative AI DocIntel flow

Related topics

Use invoice data extraction skill

Copy and activate the Invoice attachment DI processing flow

Copy and activate the Invoice attachment DI processing flow.

Before you begin

Role required: admin

Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

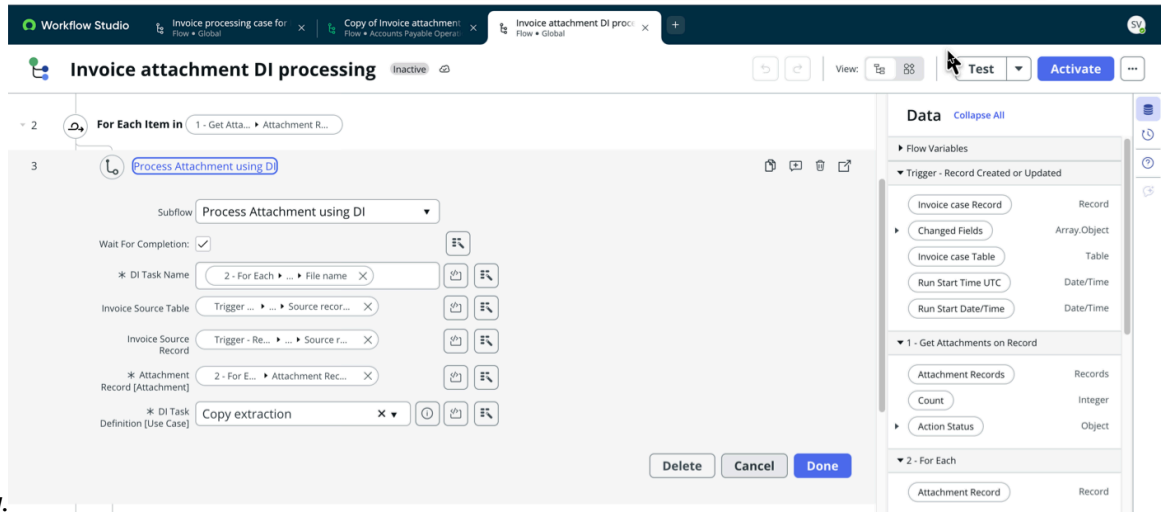
- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

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.

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4. In the **New flow name** field, enter a name for the copied flow.



5. Select **Save**.
6. Select **Activate**.
   The Invoice attachment DI processing flow is copied and activated successfully.

Copy and activate the DI STP Failed flow

Copy and activate the DI STP Failed flow.

Before you begin

Role required: admin

Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

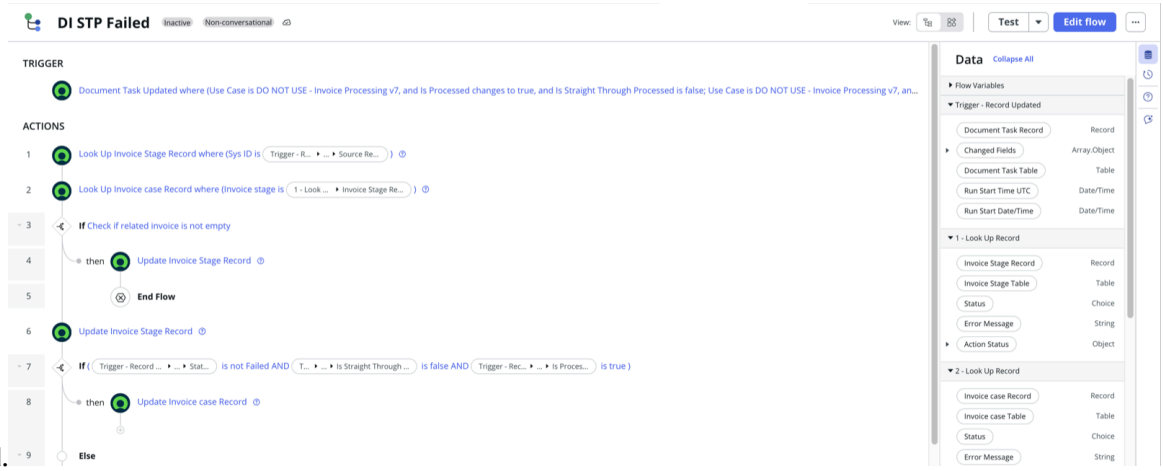
- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

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**.

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A copy of the **DI STP Failed** is created.



4. Select **Save**.
5. Select **Activate**.
   The DI STP Failed flow is copied and activated.

Copy and activate the generative AI DocIntel flow

Copy and activate the generative AI DocIntel flow to enable AI-powered invoice processing in your ServiceNow® instance.

Before you begin

Role required: admin

Scope: Accounts Payable Operations integration with Document Intelligence.

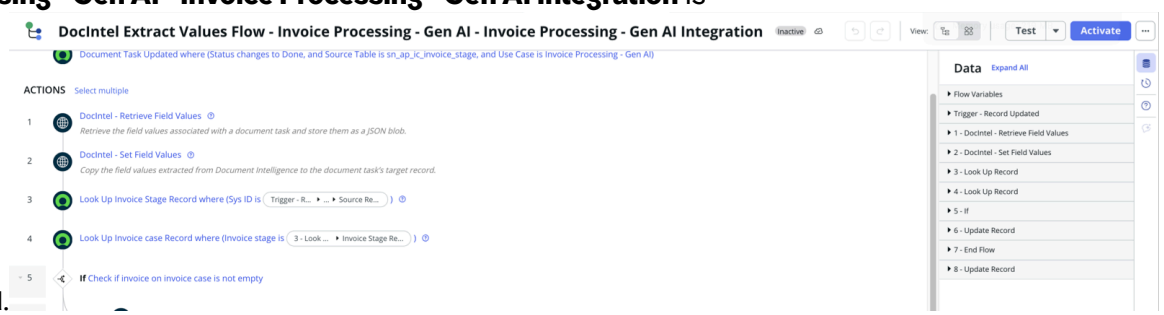
Plugins required:

- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

About this task

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **DocIntel Extract Values Flow - Invoice Processing - Gen AI - Invoice Processing - Gen AI Integration** flow.
3. Select the ••• icon > **Copy flow**.
   A copy of the **DocIntel Extract Values Flow - Invoice Processing - Gen AI - Invoice Processing - Gen AI Integration** is created.



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4. Select **Save** > **Activate**.
   The **DocIntel Extract Values Flow - Invoice Processing - Gen AI - Invoice Processing - Gen AI Integration** is copied and activated successfully.

Related topics

Use invoice data extraction skill

Configure data extraction modes

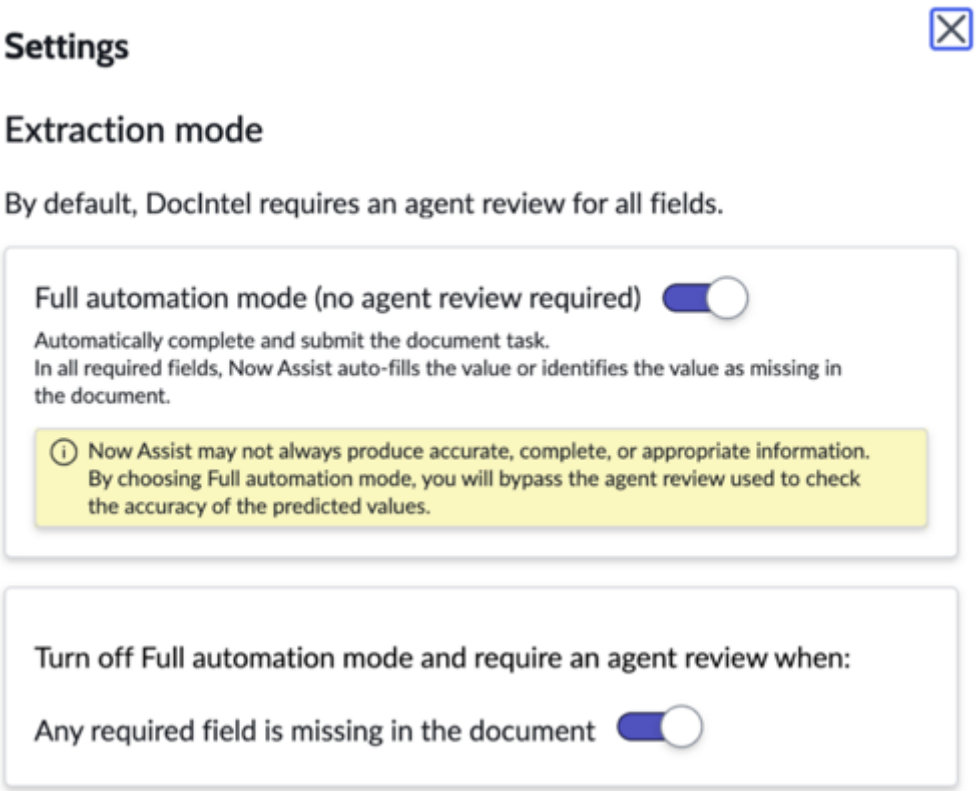
Configure Document Intelligence extraction modes for invoice processing use cases to define how fields are extracted from invoice documents.

Before you begin

Role required: sn_docintel.manager

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. In the workflow group, select > **Finance and Supply Chain** > **Invoice data extraction** to view the skills for the APO features.
3. Select the settings  icon.
4. Select the extraction mode for the use case**Accounts Payable**



Operations.

5. Adjust the DocIntel full automation mode.

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- When Full automation mode is turned on, DocIntel automatically completes and submits the document task. The required values or fields in the invoice document are auto-filled or identified as missing in the document. If there are no fields defined as required for the document task, then DocIntel automatically completes and submits the document task.
- When you turn on the **Any required field is missing in the document**, the full automation mode is turned off and requires an agent review.

6. Select **Save**.

Result
Document Intelligence Data extraction mode is activated.

Configure Accounts payable document classification skill

Configure the Document classification skill to automatically identify and categorize incoming documents by type before the invoice extraction process begins.

Before you begin
Role required: admin

Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** > and select the **AI skills** > > **Common Finance & Supply Chain features** tab of the AI Admin Hub console.
2. Select **Finance and Supply Chain** > **Accounts Payable Operations** > **Accounts payable document classification** to view the skills for the APO features.
3. Select **Activate** the skill.
4. Select **Save and continue**.
5. In the **Review and activate** section, select **Activate**.
   The **Accounts payable document classification** use case is provided as out of the box within the skill. Make a copy of the following OOB flows in the flow designer and activate.
   - Invoice processing case for invoice email
   - Process classification attachment using DI
   - Classification values on invoice staging
   -

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Note: The **Manual Classification on DI Error** scheduler runs every 30 minutes, checking for invoice cases where the DocIntel status is stuck in processing classification, and performs the following actions:

- Sets the DI status to Classification failed and the staging record status to Review required if all associated staging records are stuck in in-processing state
- Sets the DI status to Classification STP failed and the staging record status to Review required if some associated staging records are stuck in in-processing state

The **Manual Classification on DI Error** scheduler is inactive by default. Activate the scheduler to pick invoice cases that are stuck in processing classification.

The **Accounts payable document classification** is activated and the incoming email with attached documents are automatically categorized into invoices in the workspace.

Configure Invoice Processing Case for Invoice Email flow

Configure the invoice processing case invoice email flow to process invoices received through email.

Before you begin

Role required: admin

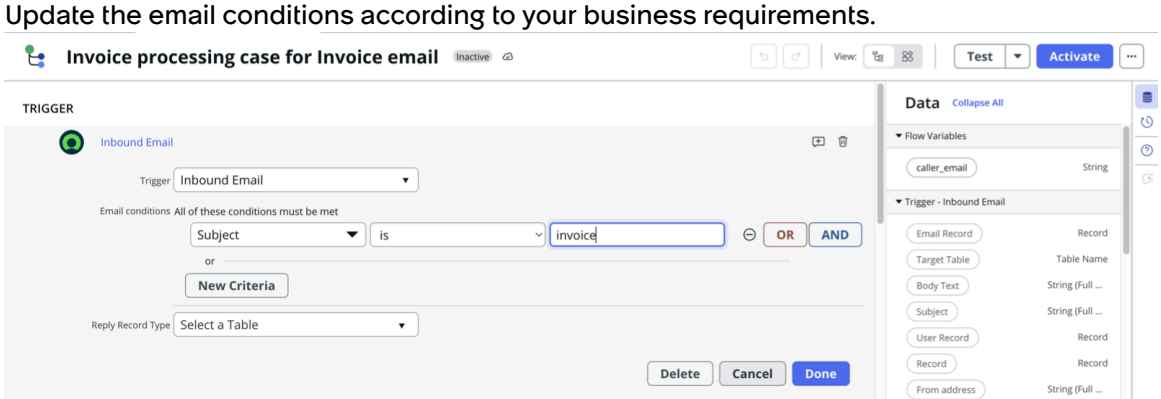
Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

Procedure

1. Navigate to **All** > **Flow designer** > **Workflow Studio** > **Flows**.
2. Search for **Invoice Processing Case for Invoice email** flow.
3. Select the ··· icon > **Copy flow**.
   A copy of the **Invoice Processing Case for Invoice email** is created.
4. Open the TRIGGER > Inbound Email.
5. Update the email conditions according to your business requirements.



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Note: If you're upgrading Accounts Payable Operations from previous versions to version 12, then you must deactivate the existing **Invoice Processing Case for Invoice email** flow and make a fresh copy of the **Invoice Processing Case for Invoice email** flow to process invoices received through email.

6. Select **Done**.
7. Select **Activate**.
   The Invoice Processing Case for Invoice email flow is activated.

Result

The invoice processing case invoice email flow is configured to process invoices received through email.

Configure Process Classification Attachment using DI flow

Copy and activate the Process Classification Attachment using DI flow to submit email attachments to Document Intelligence for document type identification. Complete this task as part of the Accounts Payable Operations integration with Document Intelligence.

Before you begin

Role required: admin

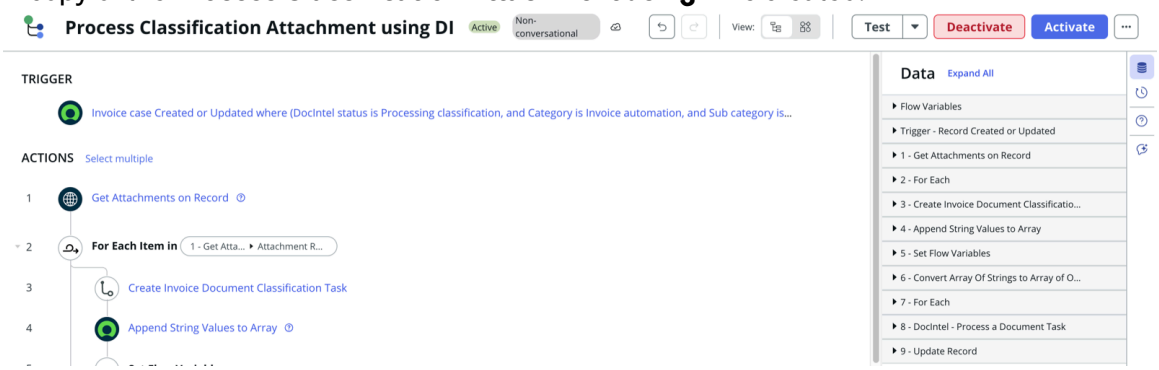
Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

Procedure

1. Navigate to **All** > **Flow designer** > **Workflow Studio** > **Flows**.
2. Search for **Process Classification Attachment using DI** flow.
3. Select the ··· icon > **Copy flow**.
   A copy of the **Process Classification Attachment using DI** is created.



4. Select **Done**.
5. Select **Activate**.
   The Process classification attachment using DI flow is activated.

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Configure Set Classification Values on Invoice Stage flow

Configure the classification values within the invoice stage flow using the flow designer to write back the classification results into the invoice record for subsequent processing.

Before you begin

Role required: admin

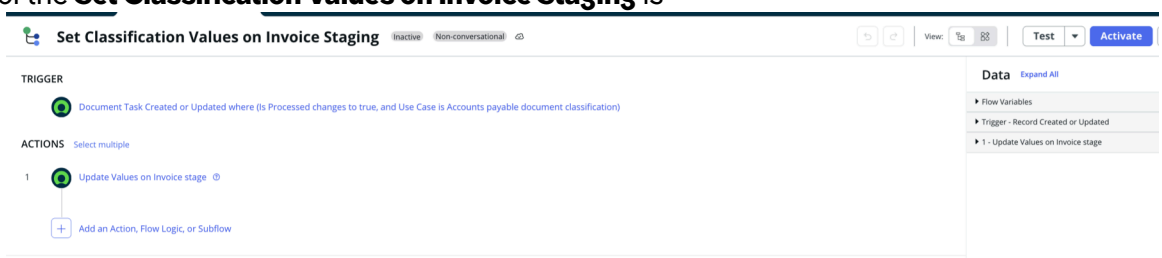
Scope: Accounts Payable Operations integration with Document Intelligence.

Plugins required:

- ServiceNow Otto in Document Intelligence
- Account Payable Invoice Processing
- ServiceNow Otto for Accounts Payable Operations (APO)
- Document Intelligence for Accounts Payable Operations Content Pack

Procedure

1. Navigate to **All** > **Flow designer** > **Workflow Studio** > **Flows**.
2. Search for **Set Classification Values on Invoice Staging** flow.
3. Select the ••• icon > **Copy flow**.
   A copy of the **Set Classification Values on Invoice Staging** is created.



4. Select **Done**.
5. Select **Activate**.
   The flow is activated and the classification results are inserted the invoice record for subsequent processing.

Configure Email response generation skill in ServiceNow Otto for Accounts Payable Operations (APO)

Configure the email response generation skill in ServiceNow Otto for Accounts Payable Operations (APO) so that accounts payable (AP) fulfillers can use generative AI skills in Source-to-Pay Workspace to draft professional responses.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. In the **Finance and Supply Chain** workflow group, select **Accounts Payable Operations** to view the skills for the APO features.
   a. Select **Email response for invoice case** if you want to activate the skill for invoice case.
   b. Select **Email response for invoice task** if you want to activate the skill for invoice task.

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For more information on email generation, see Generate email response for invoice case and Generate email response for invoice task.

3. Select **Activate skill**.
   A guided setup leads you through the configuration of the input, availability, access, display, review, and activation of the customized skill. If you complete the entire walk-through, the skill is activated.
4. Select **Save and continue** to go to the next step.
5. Configure where to display the email response for invoice case or task.

   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.

6. Review and activate the skill.
   For more information on drafting email responses in an invoice case or a task, see Composing emails with predefined content from the Source-to-Pay Workspace.

Result

The Email generation for invoice case is activated. You can now select  in the Email tab of an invoice case or a task to draft professional responses.

Configure Sentiment analysis for invoice case skill in ServiceNow Otto for Accounts Payable Operations (APO)

Configure the Sentiment analysis skill in ServiceNow Otto for Accounts Payable Operations (APO) so that an accounts payable (AP) fulfiller can use generative AI skills to prioritize inquiry cases. This improves supplier collaboration.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. In the **Finance and Supply Chain** workflow group, select **Accounts Payable Operations** to view the skills for the APO features.
   A guided setup leads you through the configuration of the general details, input, frequency, availability, access, display, review, and activation of the customized skill. If you complete the entire walk-through, the skill is activated.
3. Select **Save and continue** to go to the next step.
4. Configure where to display the sentiment analysis for invoice case.

   a. Select **In-product**.
      In-product: When selected, the generated AI skills are displayed on the forms and workspaces.

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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.

5. Review and activate the skill.
   Review your choices and select **Activate** the skill. For more information on sentiment analysis in an invoice case, see Analyze sentiments in invoice cases.

Result

You can now select  of an invoice case that displays a pop-up with a summary based on the sentiment.

Customize ServiceNow Otto for Accounts Payable Operations (APO) skill

Customize a ServiceNow Otto skill as an admin to configure how AP fulfillers use generative AI capabilities in the Source-to-Pay Workspace and Core UI.

Before you begin

Role required: admin

About this task

From the AI Admin Hub console, you can select the input table, related records, and fields for each input template of the Invoice case Summarization, Invoice data extraction skill. You can then configure the prompt headers to be included in the general summary.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub 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 a 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. Enter a name and description for the skill.
5. Select **Save and continue** to go to the next step.
6. View the input data for each skill, such as the base input fields and related lists for the different input templates.

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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

Input 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 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

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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.

7. 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 before 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.

8. 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.

9. Configure where to display the Case summarization.

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a. Select **In-product**.
In-product: When selected, the ServiceNow Otto 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.

10. 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.
11. For Invoice data extraction:

a. On the **Invoice data extraction** 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 a 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.

12. Create and configure the use case for invoice extraction.
13. Review and activate the skill.
Review your choices and select **Activate** to complete the skill customization.

Result
You can now use the generative AI skill for matching invoice lines with purchase order.

Customize ServiceNow Otto for Accounts Payable Operations (APO) to use the Virtual Agent chat

Configure the ServiceNow Otto virtual agent as an admin to enable supplier contacts to use generative AI skills in the Source-to-Pay Workspace and Core UI.

Before you begin
Role required: admin

About this task
Use the AI Admin Hub console to configure ServiceNow Otto for APO. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub .

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Procedure

1. Install the ServiceNow Otto for Accounts Payable Operations (APO) plugin (com.snc.sn_ap_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Supporting information for ServiceNow Otto for Supplier Lifecycle Operations (SLO).
   - For information about the installation process, see Install plugins for ServiceNow Otto.
2. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
3. From the list of existing LLM Virtual Agents, select **Now Assist in Virtual Agent - Supplier**.
4. Review the details about Virtual Agent by selecting **Overview** and then selecting **Save and continue** to go to the next step in Guided Setup.
5. Review the selected conversational skills by selecting **AI Skills** and then selecting **Save and continue** to go to the next step in Guided Setup.
6. Review the selected portal by selecting **Display experience** and then selecting **Save and continue** to go to the next step in Guided Setup.
7. Review the search sources by selecting **Information Sources** and then selecting **Save and continue** to go to the next step in Guided Setup.
8. Review the branding information by selecting **Branding** and then selecting **Save and continue** to go to the next step in Guided Setup.
9. Review the structure of the chat experience by selecting **Chat experience** and then selecting **Save and continue** to go to the next step in Guided Setup.
10. Review all the details by selecting **Review** and then selecting **Turn on**.

Use ServiceNow Otto for Accounts Payable Operations (APO)

ServiceNow Otto for Accounts Payable Operations (APO) helps accounts payable specialists and agents summarize invoice case details, completed actions, and pending tasks.

Summarize a record by using ServiceNow Otto for Accounts Payable Operations (APO)

Generate AI-powered summaries of invoice and inquiry case records in ServiceNow Otto for Accounts Payable Operations (APO) to quickly understand status, completed actions, and next steps.

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.

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Option	Procedure
Generate a summary for the invoice case record.	**a.** Navigate to **Lists** > > **Invoices** > **All invoices**. **b.** Select any invoice and the link to the record under the Number column. **c.** Open an invoice record and select **Cases**.
Generate a summary for the inquiry case record.	**a.** Navigate to **Lists** > > **All work** > **Cases**. **b.** Select any inquiry case and the link to the record under the Number column. **c.** Open an invoice inquiry record.

4. On the **Cases** tab, in the Record summary section, select **Summarize**.

   When you opt to summarize an invoice case, you see the following message: "AI 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:** Add the summary to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the recorded work notes	**a.** Select **Share to work notes**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expanded card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill.

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Option	Procedure
Copy the record summary	Select the copy to clipboard icon ( ) to use the record summary information for another purpose, such as pasting into an email.
View the information about the record summary	If you want to check some details about the summary, select the more info icon ( ).

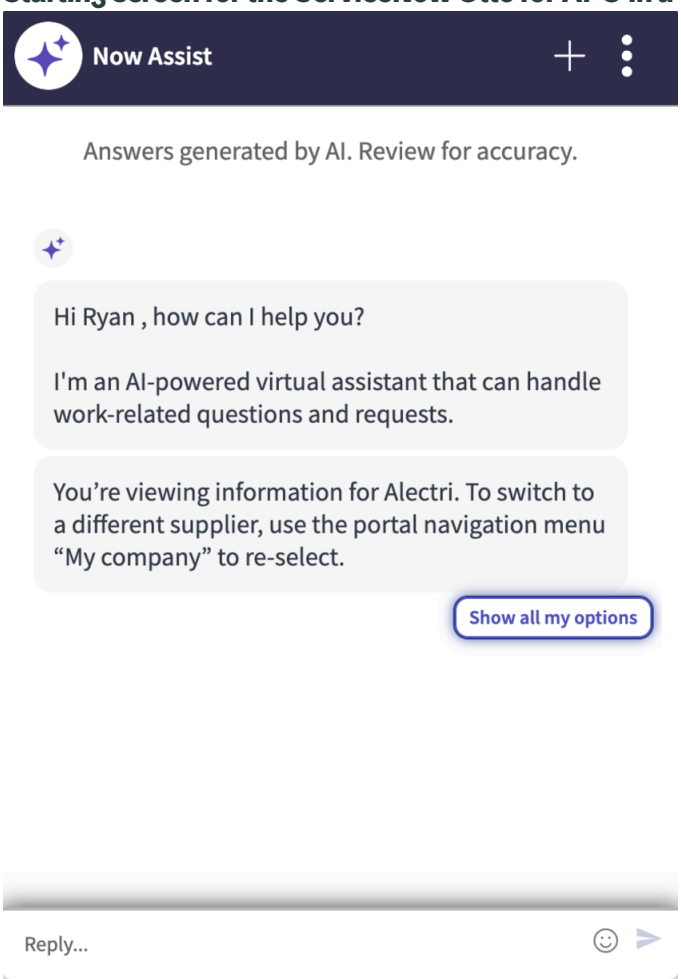
Use ServiceNow Otto for Accounts Payable Operations (APO) in a Virtual Agent chat

Use the conversational interface of ServiceNow Otto for Accounts Payable Operations (APO) to request contextually relevant generative AI capabilities through a Virtual Agent chat.

As a fulfiller, you can use the predefined topics (chatbot conversations) that are designed to help you complete self-service tasks. You can submit a request, track a request status, or connect to a live agent by using contextual generative AI capabilities.

To start a conversation, navigate to **All** > **Supplier Lifecycle Operations** > **Supplier Collaboration Portal** and select the Virtual Agent chat icon ( ) as shown in the following example.

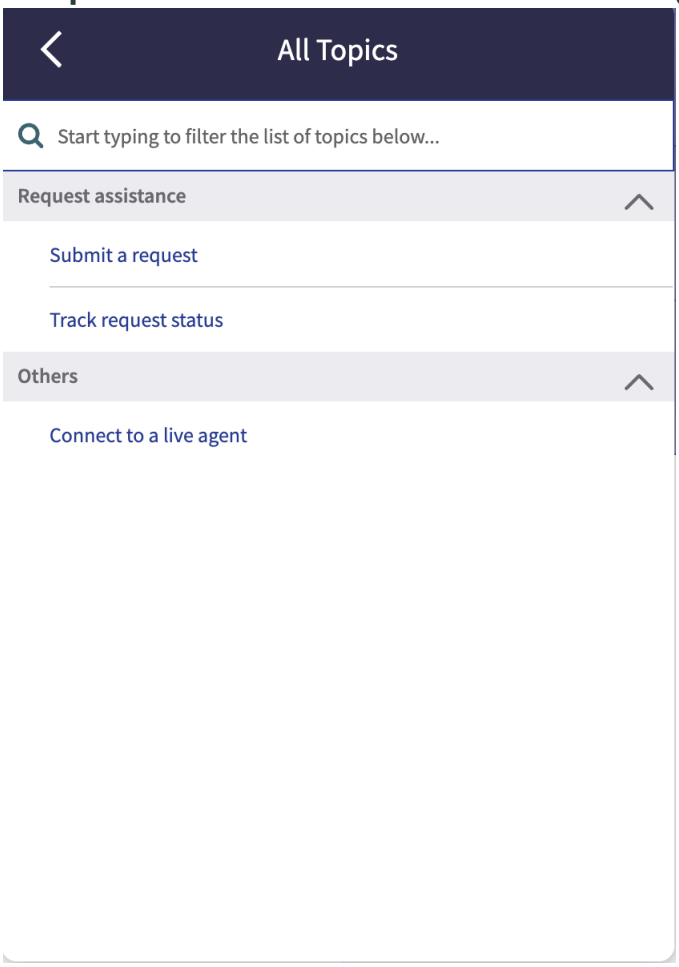
Starting screen for the ServiceNow Otto for APO in a Virtual Agent chat



Then, see all your available options by selecting **Show all my options** as shown in the following example.

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All topics in a ServiceNow Otto for APO in a Virtual Agent chat



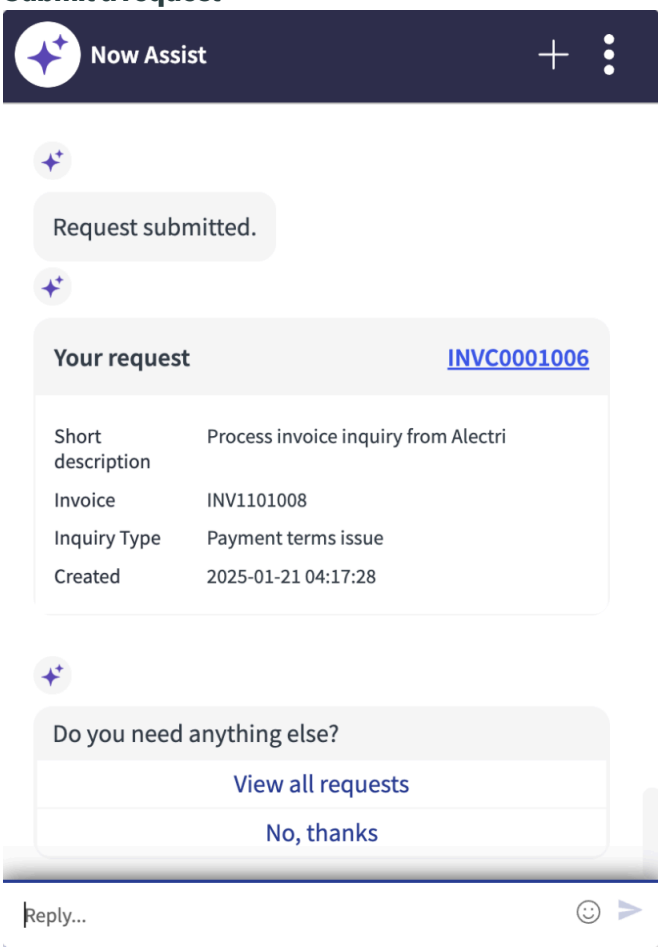
Using a predefined topic to submit a request

As a fulfiller, you can submit an invoice inquiry by selecting **Show all my options** > **Submit a request**. You could also directly start entering the instructions.

Then, enter `Invoice inquiry` in the chat, select an inquiry type, and create an invoice case by selecting **Yes, submit** as shown in the following example.

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Submit a request



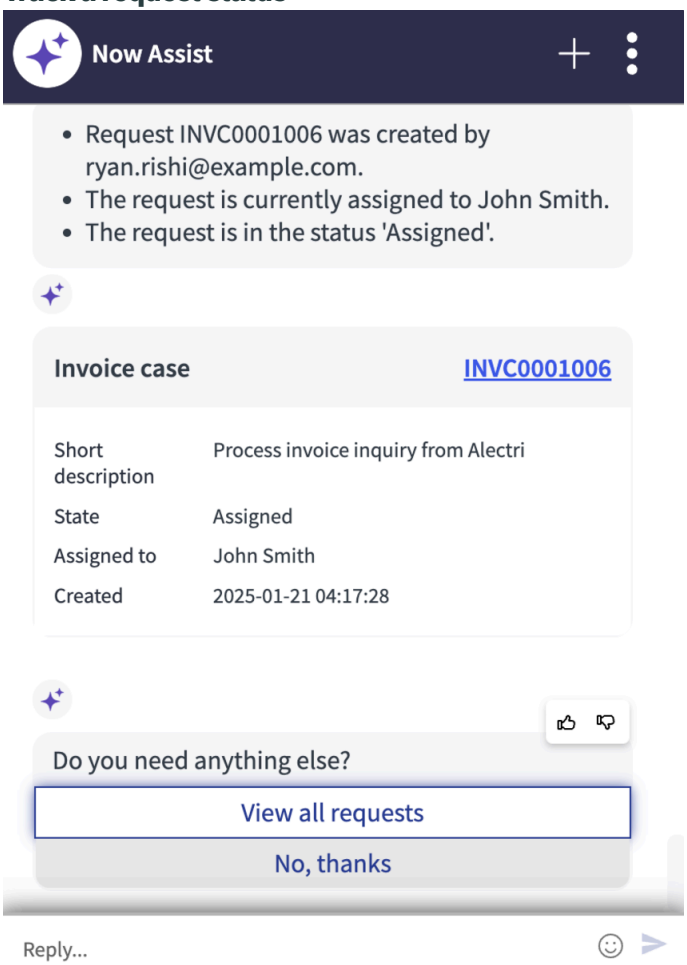
Using a predefined topic to track a request status

As a fulfiller, you can track an invoice inquiry status by selecting **Show all my options** > **Track request status**. You could also directly start entering the instructions.

For example, enter `Invoice case number or invoice number` in the chat to view the status of the request as shown in the following example.

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Track a request status



Using a predefined topic to connect to a live agent

As a fulfiller, you can connect to a live agent by selecting **Show all my options** > **Connect to a live agent**.

You can connect to a live agent by selecting **Accounts payable team**.

Additional Information

Now Assist in Virtual Agent provides your users with an interactive generative AI experience. A friendly, natural language conversation is easier to understand and makes fulfillers more comfortable with talking to a bot. To learn how a conversation that is powered by generative AI might look in Virtual Agent, see Using ServiceNow® Otto for 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 AI Analytics dashboard indicator details Now Assist in Virtual Agent Analytics calculates the conversation deflection rate based on the resolution status associated with Now Assist query responses.

For detailed information on Now Assist in Virtual Agent in general, and ServiceNow Otto for APO in particular, see Explore ServiceNow Otto for Accounts Payable Operations (APO).

For information on configuring ServiceNow Otto for APO, see Configure ServiceNow Otto for Accounts Payable Operations (APO).

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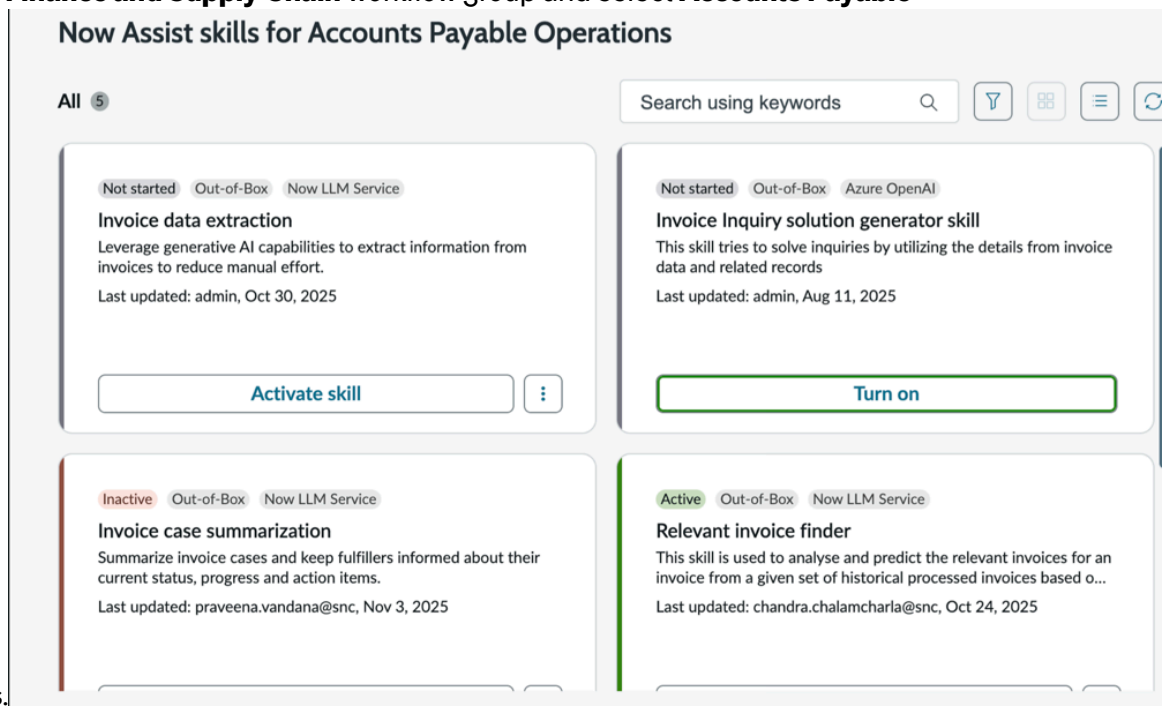
Use Invoice inquiry solution generator skill

Turn on the Invoice inquiry solution generator skill, which automates the resolution generation for inquiry cases.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** and select the **AI Skills** tab in the AI Admin Hub console.
2. Expand the **Finance and Supply Chain** workflow group and select **Accounts Payable Operations**.



3. Select **Invoice inquiry solution generator skill**> **Turn on**to activate the skill.
   Activate the skill in the **Turn on skill** pop-up. The skill works in relation with the Inquiry resolution provider agent. For more information on the Inquiry resolution provider AI agent, see Inquiry resolution provider AI agent.

Result
AI skills and the AI agent analyze the invoice and related inquiry data, then recommend a resolution. The AP agent reviews the recommendation and the case closure notes are updated automatically.

Use purchase order line mapping

Use the purchase order line mapping skill to automatically map invoice lines to purchase order lines and reduce manual matching effort.

Before you begin
Role required: admin

Procedure

1. Activate the purchase order line mapping skill.
2. Navigate to **All** > **Accounts Payable Operations** > **Properties**.

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The Now Assist skill evaluates and executes rules on the invoice lines and performs the invoice line mapping with purchase order line mapping. For more information on setting APO properties, see Set APO properties. In the playbook, the match lines card allows you to review the mapping performed by Now Assist. For more information on the match lines card, see step 7 of Using Playbook in Accounts Payable Operations.

Result

The Now Assist skill maps the invoice lines with purchase order lines.

Analyze sentiments in invoice cases

Use the Sentiment Analysis skill in ServiceNow Otto for Accounts Payable Operations (APO) to analyze requester's response and determine the sentiment associated with an invoice case.

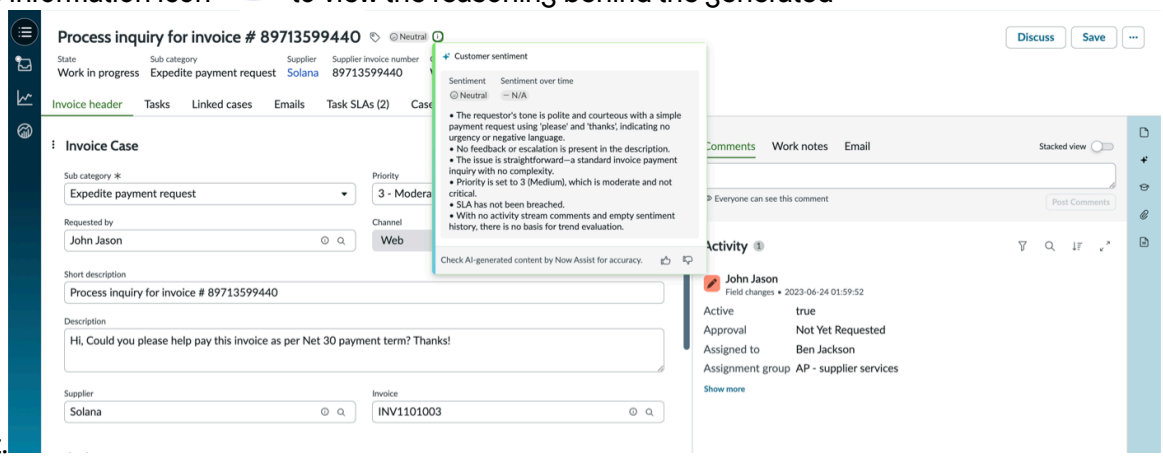
Before you begin

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

Role required: sn_slm.fulfiller, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
4. Select an invoice case.
   The case detailed view appears.
5. Select the information icon to view the reasoning behind the generated sentiment.



You can view the updated Sentiment analysis by selecting the refresh icon .
Invoice cases display Sentiment analysis.

Generate email response for invoice case

Generate email response for invoice case.

Before you begin

Role required: ap_agent or ap_specialist

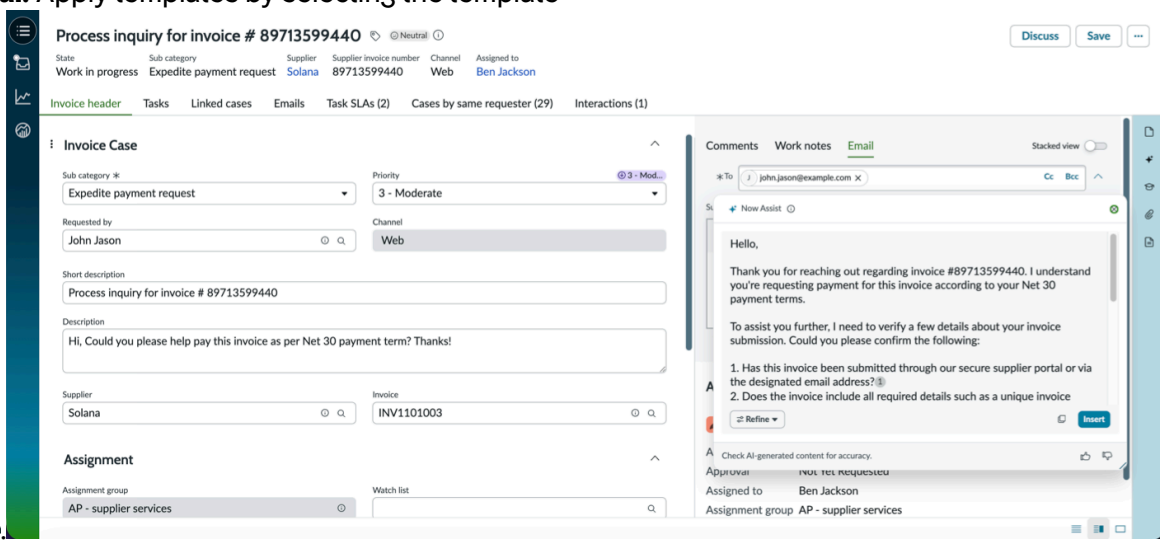
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About this task

The Email response for invoice case skill uses invoice case details to compose an email response. These details include case type, short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles. You can also use this skill to elaborate, shorten, or change the tone of your email draft.

Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
4. Select an invoice case.
   The case detail view appears.
5. In the **Email** tab, select anywhere within the email body text box.
6. Generate an email draft by selecting the AI icon .
7. Select **Insert**.
8. **Optional:** Select **Refine** to elaborate, shorten, or change the tone of an email body.
9. **Optional:** Apply templates by selecting the template icon .



The email response is generated for the invoice case.

Generate email response for invoice task

Generate email response for invoice task.

Before you begin

Role required: ap_agent or ap_specialist

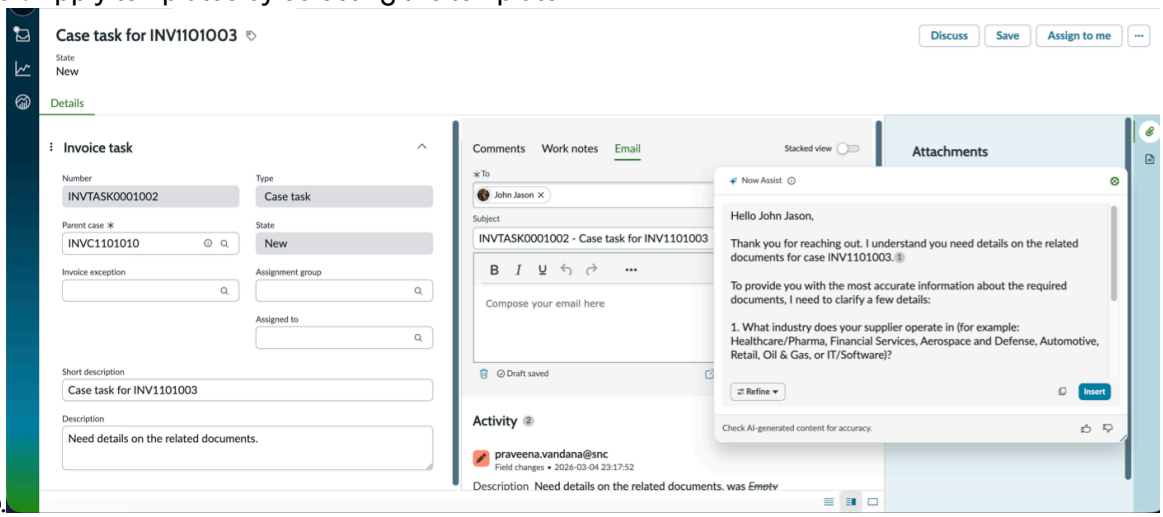
About this task

The Email response for invoice task skill uses invoice task details to compose an email response. These details include short description, description, work notes, activity stream, additional comments, related records, and relevant knowledge base articles. You can also use this skill to elaborate, shorten, or change the tone of your email draft.

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Procedure

1. Navigate to **Workspaces** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
4. Select an invoice case.
   The case detail view appears.
5. Select **Tasks**.
6. In the **Email** tab, select anywhere within the email body text box.
7. Generate an email draft by selecting the ServiceNow Otto icon .
8. Select **Insert**.
9. **Optional:** Select **Refine** to elaborate, shorten, or change the tone of an email body.
10. **Optional:** Apply templates by selecting the template icon .



The email response is generated for the invoice task.

Generate a knowledge article from a case

Use ServiceNow Otto to generate a knowledge article from a closed case in the Source-to-Pay Workspace.

Before you begin

The case must be in the **Closed** state with no existing knowledge article linked to it.

Knowledge article generation for invoice case skill must be configured.

Role required: sn_ap_apm.accounts_payable_specialist, sn_ap_cm.agent, sn_ap_gen_ai.nowassist_fulfiller

About this task

Generate a knowledge article from a closed case to capture solutions and build your knowledge repository. ServiceNow Otto drafts the article content based on case details, which you can review and edit before publishing.

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Procedure

1. Navigate to **Source-to-Pay Workspace** > **List view**.
2. Open a case assigned to you in the **Closed** state.
3. Select **Create Knowledge**.
   The **Create Knowledge** action appears only when no knowledge article is linked to the case.
   The Use AI to draft this article modal opens.
4. Select **Draft with AI**.
   ServiceNow Otto generates the article content. If similar cases exist, a modal displays cases you can include in the article.
5. **Optional:** Select up to five similar cases to include in the article, then select **Continue with selected tasks**.
   If no similar cases exist, the article is created directly without this step. Similar cases are identified by the AI Search profile titled [KM] Multi-task Article Generation.
   The generated article appears in a new tab with a unique ID and is linked to the case.
6. **Optional:** Select **Generate Knowledge** from the ServiceNow Otto panel to create a knowledge article.
   You're prompted to enter the task number.
   The generated article appears in a new tab with a unique ID and is linked to the case.
7. Review and edit the generated article content.
   Verify the accuracy of all AI-generated content before publishing.
8. Select **Save**.
   The article is saved as a draft.
9. Select **Publish**.
   A success message appears indicating the article is published.

Result

The published knowledge article is linked to the case and available in the knowledge base.

Trouble?

If the article generation fails, an error message appears. Verify that knowledge article generation is configured correctly and try again. If the issue persists, contact your administrator.

Generate a knowledge article from multiple cases

Use ServiceNow Otto to generate a single knowledge article from multiple closed cases.

Before you begin

The cases must be in the **Closed** state.

Knowledge article generation for invoice case skill must be configured.

Role required: sn_ap_apm.accounts_payable_specialist, sn_ap_cm.agent, sn_ap_gen_ai.nowassist_fulfiller

About this task

Generate a knowledge article from multiple related cases to create comprehensive documentation that addresses common issues. Use this workflow to expand your knowledge repository from a set of closed cases rather than one case at a time.

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Procedure

1. Navigate to **All** > **Knowledge** > **Create New Article**.
   The Use AI to draft this article modal opens.
2. Select **Draft with AI**.
3. Select the case type from the list.
   Available case types include invoice and inquiry case.
4. In the **Search from tasks** field, enter keywords to find cases.
   Cases matching your search criteria appear in the results list.
5. Select the cases you want to combine into a single knowledge article.
   You can select multiple cases that address similar issues or solutions.
6. Select **Continue with selected tasks**.
   ServiceNow Otto generates article content based on the selected cases.
7. To ensure accuracy, review and edit the generated article content.
   Verify the accuracy of all AI-generated content before publishing. The article combines information from all selected cases.
8. Select **Submit**.
   A message appears confirms that the knowledge article is saved as a draft and linked to all selected cases.
9. Select **View Article** to open the draft article.
10. Make any final edits to the article.
11. Select **Publish**.
    A success message appears indicating the article is published.

Result

The published knowledge article is linked to all selected cases and available in the knowledge base.

Trouble?

If article generation fails, an error message appears. Verify that knowledge article generation is configured correctly and try again. After the article generation process starts, it can't be stopped. Generation continues even if you close the modal.

Use AI agents in ServiceNow Otto for Accounts Payable Operations (APO)

Use AI agents to resolve invoice inquiries and recommend business owners for Non-PO invoices and credit memos.

Available AI agents for Accounts Payable Operations

Available AI agents	Description
Inquiry resolution provider	Automates responses to high-volume, repetitive invoice inquiries that were raised by suppliers. It also reduces the workload of the AP agents.
Recommend invoice owner	When a Missing or invalid business owner exception occurs, the AI agent identifies the missing business owner through semantic matching or by creating tasks.

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The AI agents run autonomously. For more information about the AI agents, see AI Agent Studio (legacy).

Important: By default, all agentic workflows and AI agent records are read-only.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Related topics

Case resolution using inquiry resolution provider

Inquiry resolution provider AI agent

Use the Inquiry resolution provider AI agent to process high volume repetitive invoice inquiries across multiple channels to significantly reduce the workload of human agents.

AI agents

The following table lists the agents that are used in the APO.

AI agents used

AI agent	AI agent role
Inquiry resolution provider	Analyzes the inquiry case record that is based on the invoice details and related data. It suggests the resolution details to agents autonomously and updates the invoice case record with the suggested resolution.

Tools mapped to the Inquiry resolution provider AI agent

Tools used in the Inquiry resolution provider AI agent

Tool type	Execution mode	Name	Description
Scripts	Autonomous	Invoice Inquiry resolution generator and case update	Collects data from invoice, invoice lines, invoice tax lines, exceptions, purchase order, and purchase order line tables. Generates a resolution for an inquiry case and updates the case record. If no invoice is provided as input, collects information from the knowledge base article configured in system properties.
Scripts	Autonomous	Close the case	Closes the case if the user responds positively.

Related topics

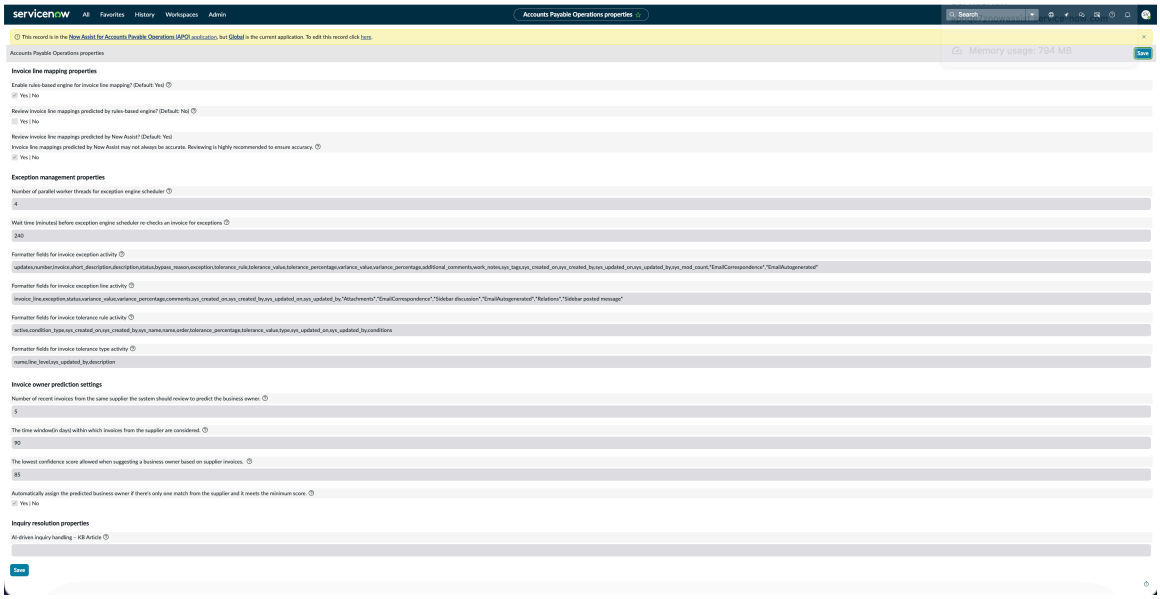
Invoice inquiry cases

Configure inquiry resolution property

Configure the inquiry resolution AI agent to extract data from KB articles.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Properties**.
   The Accounts Payable Operations properties page appears.
2. In the **Inquiry resolution properties** area, enter the title of the knowledge article that the AI agent uses to extract data and provide resolution for the inquiry case.
3. Select **Save**.

Result

The AI agent uses the data from the specified KB article to resolve the inquiry case.

What to do next

After configuring the property, activate the Inquiry resolution provider agent in AI Agent Studio. For information, see Work with the inquiry resolution provider agent

Related topics

Set APO properties

Case resolution using inquiry resolution provider

Work with the inquiry resolution provider agent

Use the inquiry resolution provider agent to generate resolutions to invoice inquiry cases raised by suppliers and employees.

Before you begin

Set the scope to Now Assist for Accounts Payable Operations.

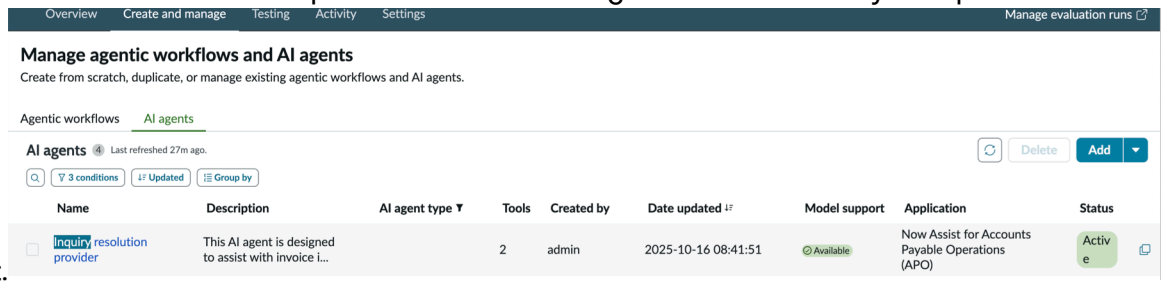
Role required: now_assist_panel_user, admin

Procedure

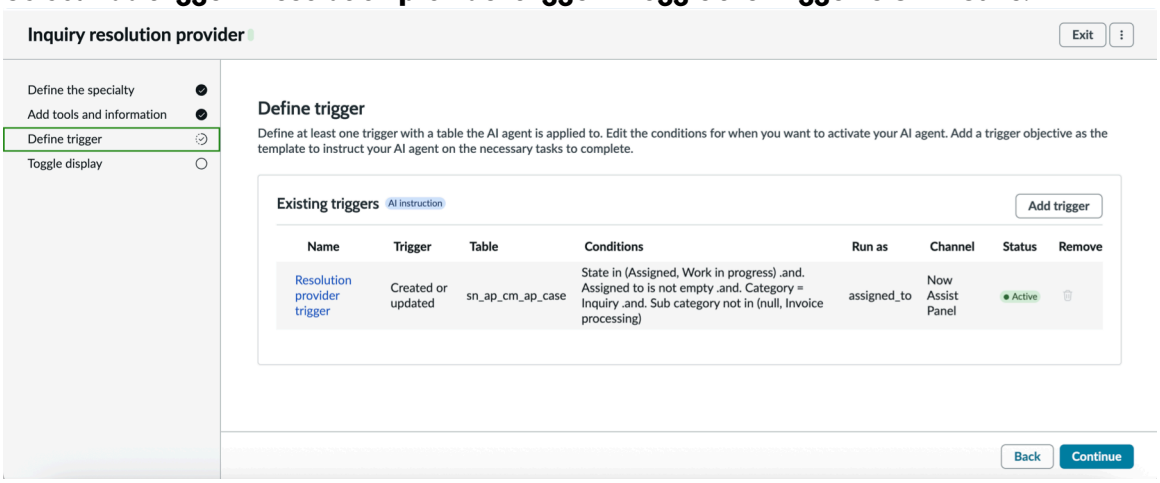
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
   The **Manage agentic workflows and AI agents** page appears.
2. Select **AI agents**.
3. Use the search icon and select **Inquiry resolution provider**.

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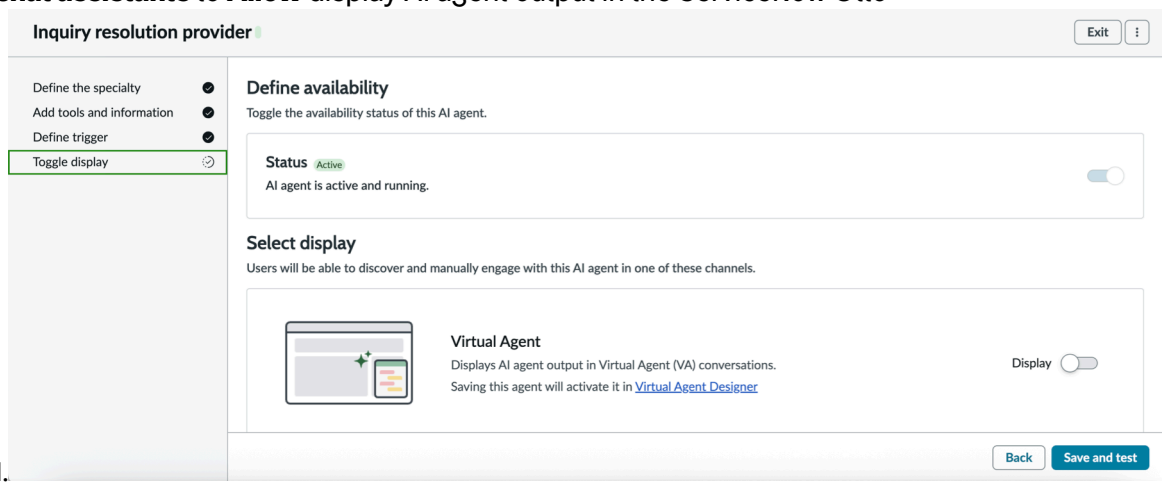
To modify this AI agent, refer to Modify an AI agent. Adjust the settings for your specific needs and activate the duplicated version of the agentic workflow after you duplicate it.



4. Review the information in the **Define the specialty** page, and then select **Continue**. The **Define the specialty** page is read-only.
5. Review the information in the **Add tools and information** page, and then select **Continue**. The **Add tools and information** page is read-only.
6. Select **Add trigger** >**Resolution provider trigger** > **Toggle the Trigger is ON** > **Save**.



7. Select **Continue**.
8. In the **Select channels and status** page, toggle the **Engage via ServiceNow Otto chat assistants** to **Allow** display AI agent output in the ServiceNow Otto panel.



9. Select **Save and test**.

Note:

If you're upgrading from previous versions to the latest version of APO, then see Inquiry resolution provider AI agent- Unable to activate agent's trigger [KB3007048].

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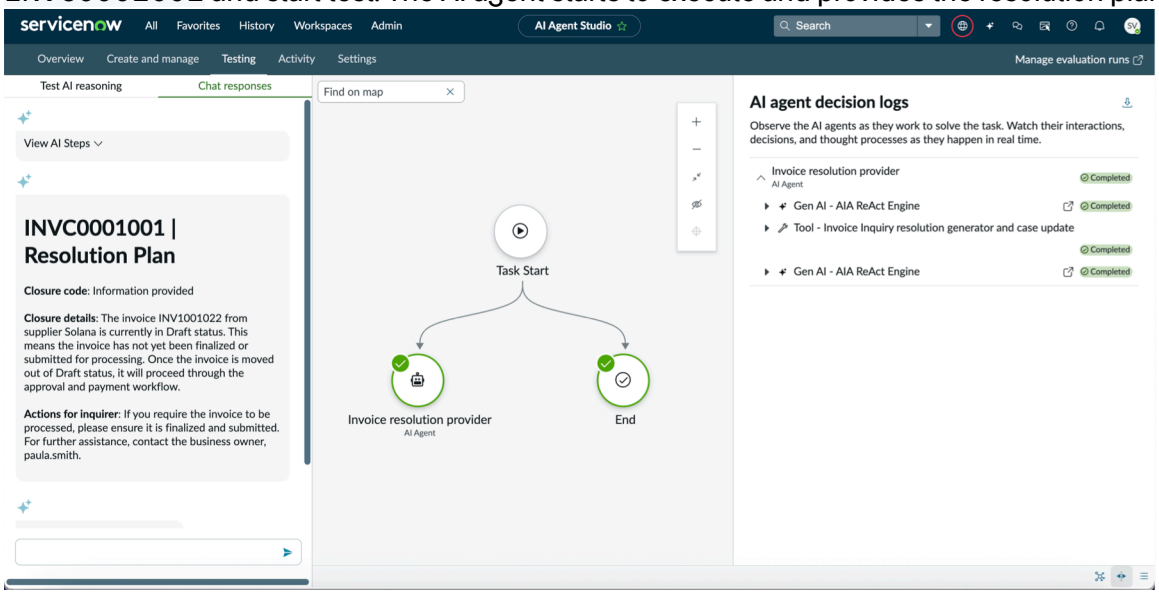
10. In the Inquiry resolution provider flow, select the trigger and set the **Run trigger** to run once.
11. Select **Done** and **Activate** the flow.
12. Navigate to **Test AI reasoning** page to begin testing your agent.

    The agent executes the testing in AI Agent Studio.

Result
The Inquiry resolution provider agent is activated.

Example: Execute Invoice resolution provider agent

Example:
Enter the objective of the task as `Help me resolve invoice inquiry INVC0001001` and start test. The AI agent starts to execute and provides the resolution plan.



Related topics
Case resolution using inquiry resolution provider

Case resolution using inquiry resolution provider

Use the AI agent to automatically extract invoice details and generate case resolutions, then review and confirm the resolution to close the inquiry case.

Before you begin
Role required: now_assist_panel_user,sn_ap_cm.agent

Procedure
1. Navigate to **Source-to-Pay Workspace** > **List view** > **All work** > **Cases** > **New**.
   The **Create new case** pop-up appears.
2. Select **Invoice case**.
   For more information on creating an inquiry case, see Invoice inquiry cases. Assign the case to the AP agent and the inquiry resolution provider AI agent is triggered.

Result
ServiceNow Otto panel displays the resolution plan and enables agents to review the AI-generated resolution plan. The closure code and closure details are auto updated in the **Assignment Closure Details** area if AP agent responds positively in the ServiceNow Otto panel.

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Related topics

Case resolution using inquiry resolution provider

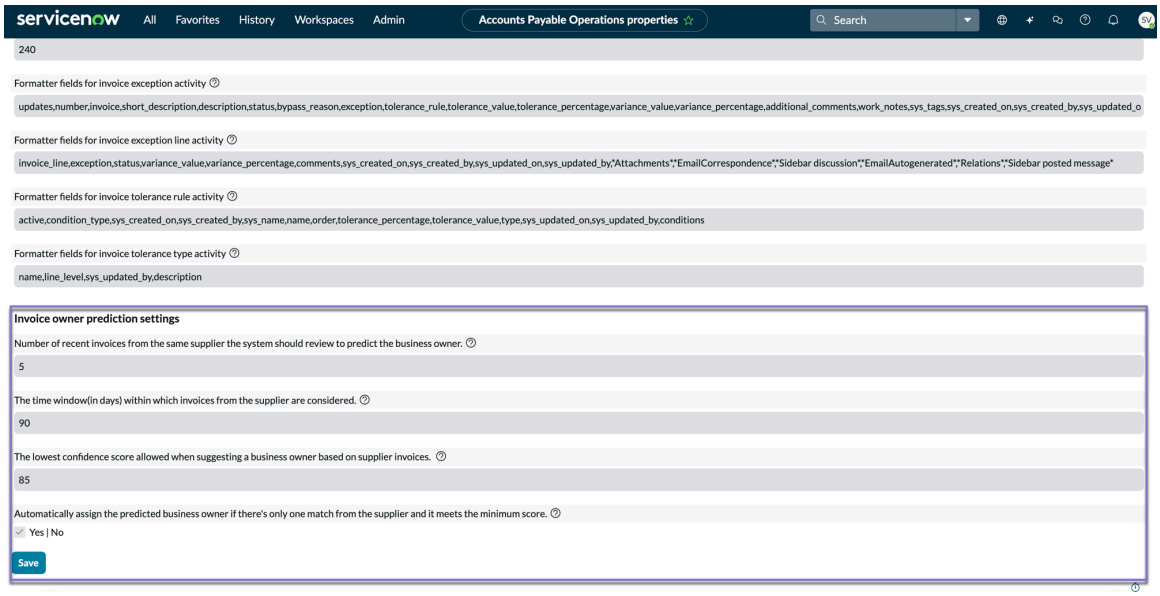
Recommend invoice owner AI agent

The Recommend invoice owner AI agent identifies missing business owners for Non-PO invoices and credit memos through semantic matching. The AI agent identifies the missing business owner through semantic matching or by creating tasks. The AI agent supports*AWS Claude*, Google Gemini, Now LLM, and GPT models.

Configuring invoice owner prediction settings

Configure system properties for the Recommend Invoice Owner AI agent to define how business owners are identified for Non-PO invoices and credit memos.

Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Properties** to access the invoice owner prediction settings. These settings influence the number of historical invoices analyzed, the time considered, and the confidence threshold used to make recommendations. The AP admin can modify these settings. For more information on the settings, see Set APO properties.



Invoice owner prediction settings and default values

Setting	Description	Default value
Number of recent invoices from the same supplier the system should review to predict the business owner	Defines the number of recent invoices from the same supplier that the AI agent analyzes when identifying a business owner.	5
The time window (in days) within which invoices from the supplier are considered	Indicates the time frame for analyzing historical invoices. By default, the AI agent evaluates invoices submitted in the past 90 days.	90 days
The lowest confidence score allowed when suggesting a business owner based on supplier invoices	Specifies the minimum semantic match score required for the AI agent to recommend a business owner. When the match score falls below the default value,	85

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Invoice owner prediction settings and default values (continued)

Setting	Description	Default value
	the AI agent prompts the AP specialist to create an exception task to review and confirm the business owner.	
Automatically assign the predicted business owner if there's only one match from the supplier and it meets the minimum score	Determines whether the AI agent automatically assigns the predicted business owner when there's a single, high-confidence match. If this property is set to true, the system updates the business owner automatically.	No

Related topics

- Set APO properties
- Resolution plan scenarios

Use Recommend invoice owner AI agent

Use the Recommend invoice owner AI agent to identify and assign business owners for Non-PO invoices and credit memos. The AI agent analyzes historically processed invoices to recommend the most likely business owner, which an accounts payable specialist can review, approve, or override.

Before you begin

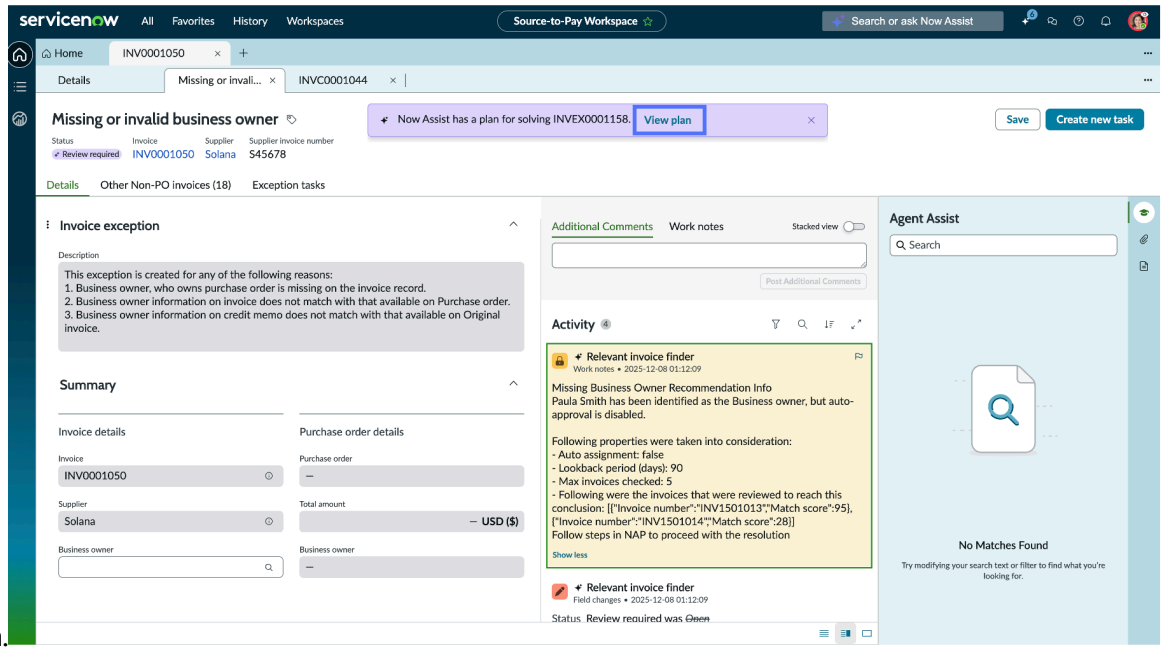
Role required: Accounts Payable specialist (sn_ap_apm.accounts_payable_specialist)

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon  .
3. Select **My work** > **Invoice exceptions**.
4. From the **Number** column, select the link for the 'Missing or invalid business owner' exception with the status **Review needed**.
   The missing or invalid business owner exception opens. A message that AI has a resolution plan to solve the exception displays.

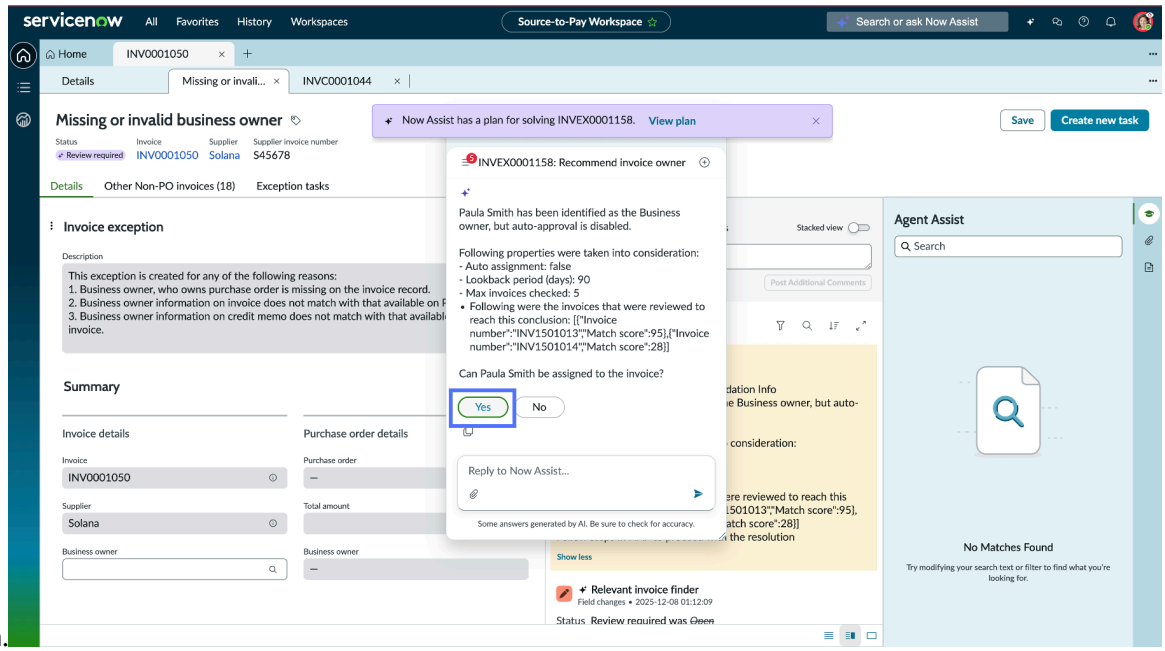
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5. Select **View plan**.



The AI agent summarizes the exception and provides a resolution plan. For more details on the resolution plan, see Resolution plan scenarios.

6. Review and confirm the resolution plan.



Result

When a business owner is found, the AI agent updates the **Business owner** field on the invoice based on the closest matching invoice. The AI agent also updates the activity and changes the exception status to **Review complete**.

If no business owner is found, the AI agent suggests creating a task.

Resolution plan scenarios

Resolution plan scenarios recommended by the Recommend invoice owner AI agent based on historical invoice data and supplier information.

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For information on using the Recommend invoice owner AI agent, see Use Recommend invoice owner AI agent.

Scenarios handled by the Recommend invoice owner AI agent

No	Scenario	Resolution plan
1	No historically processed invoices exist in the system	The Recommend invoice owner AI agent suggests reaching out to the existing supplier contact. If the accounts payable specialist opts to reach out to supplier contact, a task is created and assigned to the supplier contact.
2	Single historical owner found in the system	The Recommend invoice owner AI agent prompts whether to assign the historical business owner. On confirmation, the AI agent updates the business owner on the invoice and changes the exception status to Review complete. However, if the automatic assignment property is set to true, the business owner is assigned and no confirmation is needed.
3	Multiple historical owners found in the system	The Recommend invoice owner AI agent uses the score calculated by the Relevant invoice finder skill. If the scores of all business owners is less than the threshold, the agent suggests creating a task for the last known business owner. On confirmation, the AI agent creates and assigns the exception task to the last known business owner. If the scores of all business owners is above the threshold, the AI agent follows the single historical owner process after selecting the business owner: • If a business owner has the highest score, the AI agent selects that owner. • If multiple business owners tie for the highest score, the AI agent selects the most recent owner.

Email parser agent for APO

The Email parser AI agent processes incoming emails from suppliers and invoice owners. This agent identifies and classifies actionable requests, and routes them to the appropriate workflows to create invoice cases.

The agent intelligently distinguishes between request types such as invoice inquiries, payment inquiries, payment acceleration requests, and payment term updates. This verifies that each query is categorized correctly and routed to the appropriate business process.

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Key benefits

- Reduced manual triage: Automated classification eliminates the need for manual email review and routing.
- Faster query resolution: Structured data extraction enables quicker case creation and response.
- Consistent categorization: All queries are classified using the same criteria, ensuring uniform handling across your organization.
- Improved supplier experience: Suppliers receive faster acknowledgment and status updates on their requests.

How it works

As a prerequisite, you must set:

- Inbound email action- Trigger Intent to Action to true
- Email properties-Inbound email configuration to true

When a supplier or invoice owner sends an email, the agent receives and processes the message. The agent identifies the sender's email address and validates that the sender is a registered, active supplier contact. It then analyzes the email content to determine whether it contains one or more of the following Accounts Payable Operations request types: invoice inquiry, payment inquiry.

If the email matches one of the recognized request types, the agent extracts the relevant details and maps the request type to the appropriate case category and subcategory. The agent then initiates a case creation workflow. Informational emails that don't contain actionable requests aren't processed.

Case creation behavior

The email parser agent follows these case creation rules:

- For emails with one or more recognized request types, a case is created with the appropriate category and subcategory.
- For emails with no recognized request types (non-actionable or informational emails), no case is created. The email is archived.

AI L1 APO Service Desk Specialist

The AI L1 APO Service Desk Specialist enables AI L1 Service Desk automation for invoice inquiry use cases through a flexible, agentic AI architecture.

AI L1 APO Service Desk Specialist overview

The AI L1 APO Service Desk Specialist retrieves relevant information from published knowledge base articles and the FSC Common KG Tags added under the Enterprise knowledge graph to investigate the issue. If the specialist determines that the case can be resolved, it posts the resolution in the Activity section and closes the case. If the specialist can't resolve the case with sufficient confidence, it reassigns the case to a fallback assignment group for human follow-up.

AI L1 APO Service Desk Specialist workflow

The following steps describe how the AI L1 APO Service Desk Specialist processes a general inquiry case.

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1. Supplier contact raises a general invoice inquiry case

The supplier contact submits a general inquiry through the Supplier Collaboration Portal or by sending an email. For more information on submitting supplier inquiries, see .

2. Case assigned to the AI L1 APO Service Desk Specialist

An assignment rule automatically assigns the case to the AI L1 APO Service Desk Specialist.

3. Fetch case details

The agent retrieves the case information to understand the context of the inquiry.

4. Query knowledge sources

The agent searches published knowledge base articles and the FSC Common KG Tags knowledge graph for relevant guidance, such as invoice submission guidelines. To know more about Knowledge graphs, see Knowledge Graph.

5. Generate a resolution

The agent composes a resolution based on its research and adds it to the **Activity** of the invoice inquiry case. The same resolution appears in the **Closed Notes**. This resolution is visible to the supplier contact on the Supplier Collaboration Portal.

6. Evaluate confidence and update case state

The agent evaluates a confidence score for the resolution and updates the case state based on the configured threshold. The default threshold value is 70.

- If the confidence score exceeds the threshold, the case state changes to **Awaiting Acceptance** and the resolution is sent to the supplier contact for acceptance.
- If the confidence score does not exceed the threshold, the case is reassigned to the fallback assignment group for human follow-up. The default assignment group is AP Supplier Services.

7. Resolution acceptance or rejection by the supplier contact

The supplier contact receives the resolution by email and can also view it under My Tasks on the Supplier Collaboration Portal.

- If the supplier contact accepts the resolution, the case is closed and marked as closed complete.
- If the supplier contact rejects the resolution, the case is updated with their comments and the supplier case is escalated to AP Supplier Services group for further investigation.
- If the supplier contact does not respond within 72 hours, a scheduled job runs daily to identify such cases and close them as closed complete. For more information on the supplier tasks in Supplier Collaboration Portal, see AI worker case resolution confirmation.

Related topics

AI worker case resolution confirmation

L1 APO Service Desk Specialist

The L1 APO Service Desk Specialist is a worker agent that processes incoming invoice inquiries using knowledge articles and historical data. The AP agents to focus on more complex work.

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The Zero Touch Service Desk (ZTSD) for APO enables AI L1 Service Desk automation for inquiry cases through a flexible, agentic AI architecture.

Capabilities

The L1 APO Service Desk Specialist uses pre-built skills and AI agents to:

- Classify and triage incoming invoice inquiry cases
- Investigate invoice details and related records
- Generate and deliver resolutions autonomously
- Communicate updates to suppliers and employees
- Escalate cases to human agents when AI confidence is low

How it works

A requester submits inquiry case through channels such as web, email, virtual agent, mobile, and manual entry. Invoice case is automatically assigned to AI L1 APO Service Desk Specialist through assignment rules. The worker agent searches knowledge base articles, historical data and the confidence score (>70 threshold) to generate resolutions and close the case automatically or escalate to AP specialist for further analysis. When ZTSD is inactive or paused, the worker agent can resume processing the AP case anytime and provide case resolution without human intervention.

The following steps describe how the L1 APO Service Desk AI Specialist processes invoice inquiry.

1. A user submits invoice inquiry through supplier portal.
2. The system checks whether the L1 APO Service Desk AI Specialist is active.

   Note: If the agent is not active, the request proceeds with the standard triage process and the following steps do not apply.

3. The request is assigned to the L1 APO Service Desk AI Specialist.
4. The L1 APO Service Desk AI Specialist agent triggers and searches knowledge base articles and previously resolved invoice inquiry case requests for a resolution.
5. The agent provides a resolution with helpful reference links in the **Resolution Notes** section. This gives the requester quick access to supporting documentation.
6. The agent routes the case based on confidence scoring:
   - Score above 70%: The case state changes to **Awaiting Acceptance**. The resolution is sent to the requester for acceptance and the case switches to read-only mode.
   - Score at or below 70%: The case state changes to **Draft**. The agent assigns the case to the Procurement Service Management assignment group for fulfiller review.
7. The requester receives the resolution by email and can access it in **My Tasks** in Employee Center or in the **To-Do** tab of the inquiry case details page.

Case resolution outcomes

- Accepted by requester: The case closes and is marked as **Closed Completed**.
- Rejected with Advanced Work Assignment active: The case state changes to **Work in Progress** and escalates to a fulfiller for human follow-up. For more information on Advanced Work Assignment, see Advanced Work Assignment in Accounts Payable Operations.

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- Rejected with Advanced Work Assignment inactive: The agent is unassigned from the case.
- No response within 72 hours: A scheduled job closes the case as **Closed Completed**.

Key components

The following table describes the key components of the L1 APO Service Desk Specialist.

Plugins

To access the AI L1 APO Service Desk Specialist, the following plugins must be installed:

- ServiceNow Otto for Accounts Payable Operations (APO)
- Zero Touch Service Desk plugin (`com.snc.sn_ztsd`)

Knowledge sources

The L1 APO uses AI search profile to search the knowledge base articles, previously published articles, historical data for effective case resolution.

View ZTSD agent activities in the contextual side panel

Review the agentic workflow activity for an invoice inquiry case processed by the L1 APO Service Desk AI Specialist.

Before you begin

Role required: sn_ap_fulfiller

About this task

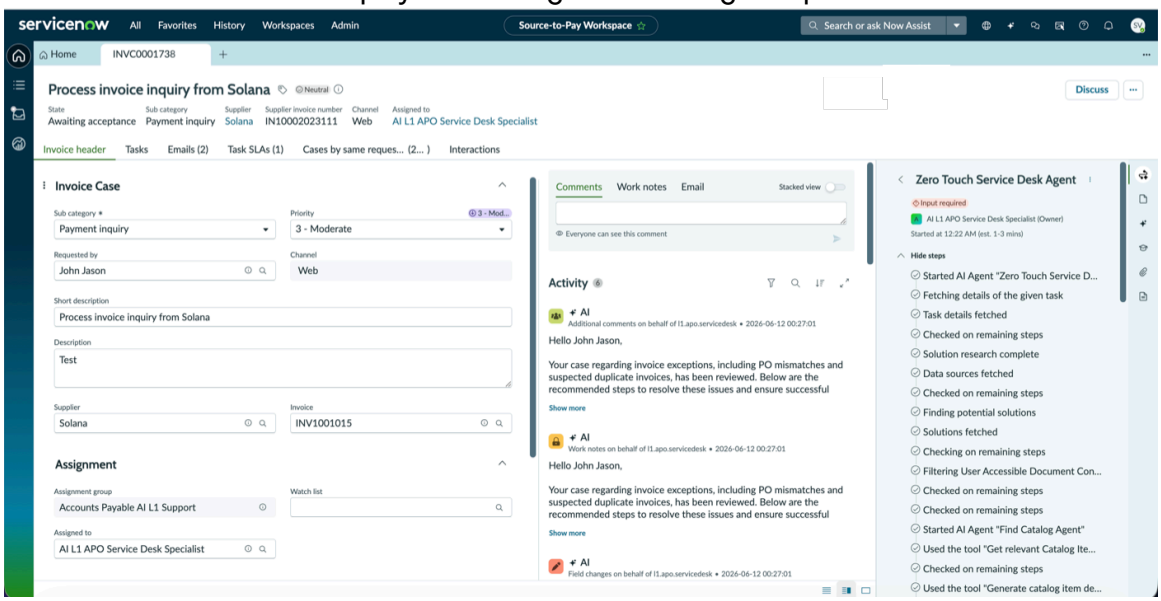
Select the **Agentic Processes** icon from the contextual side panel of an invoice case to review the progress or results of AI workflows.

Procedure

1. Open an invoice inquiry case that the L1 APO Service Desk AI Specialist has processed.
2. Select the Agentic Processes  icon from the contextual side panel.
3. Open details of **Zero Touch Service Desk Agent** to view the details of the agent's work.
   - Select Show steps to view the steps the agent performed to investigate the request.
   - View the generated response in the Review output section.

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- You can choose to show history or hide history of the agent's work.
- The state of the invoice inquiry case changes to Awaiting acceptance.



Result
The requester is notified about the resolution in the Supplier Collaboration portal. For more information see, AI worker case resolution confirmation

Explore Accounts Payable Operations

Learn about the key features and capabilities of Accounts Payable Operations.

Key features

Accounts Payable Operations includes the following features:

- Automatically create cases for inquiries received via email from your employees or the suppliers
- Ingest invoices and perform end-to-end invoice processing using workflows from invoice ingestion to approval

Benefits

Accounts Payable Operations offers the following benefits:

- Resolve inquiries from employees and suppliers using self-service
- Automate invoice processing and therefore allocate your work resources to more important tasks
- Detect duplicate invoices to prevent the same invoice from being paid twice
- Verify, process, and reconcile invoices to expedite payment to suppliers
- Identify invoice exceptions to prevent fraudulent invoices from getting processed

Accounts Payable Operations applications

Accounts Payable Operations includes the following applications:

Accounts Payable Invoice Processing

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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.

Note: Source-to-Pay Workspace uses and customizes the existing capabilities of the Source-to-Pay Workspace for its own specific requirements.

Accounts Payable Operations integration with Document Intelligence

The ServiceNow® Accounts Payable Operations integration with Document Intelligence application captures data from invoices received via email or through APIs and automatically creates invoices and invoice lines in Accounts Payable Operations.

Overview of invoice processing workflow

The following figure shows a high-level illustration of the various components that are involved in the processing of invoice in Accounts Payable Operations.



Accounts Payable Invoice Processing

Accounts Payable Invoice Processing (com.sn_ap_apm) enables Accounts Payable Specialists to ingest invoice documents and extract invoice data using ServiceNow® Document Intelligence.

Accounts Payable Invoice Processing also enables purchase order matching, invoice exception management, and invoice approval management. Thus, enabling Account Payable Specialists to manage the entire life cycle of an invoice, from its ingestion to approval.

For more information about installing Accounts Payable Invoice Processing, see Install Accounts Payable Invoice Processing.

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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**.

Note: Check your entitlements to determine whether you have access to Invoice case management.

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 Using search in Next Experience.

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 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

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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.

Configure Accounts Payable Operations

Plan and configure your implementation for Accounts Payable Operations.

Install Accounts Payable Invoice Processing

You can install the Accounts Payable Invoice Processing (com.sn_ap_apm) application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Accounts Payable Invoice Processing application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Accounts Payable Invoice Processing (com.sn_ap_apm) application installs the following dependent plugins:
  - Invoice Case Management (com.sn_ap_cm)
  - Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic)

Role required: admin

About this task

The following items are installed with Accounts Payable Operations :

- Plugins
- Roles
- Flows
- Tables

For more information, see Components installed with Accounts Payable Invoice Processing.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Accounts Payable Operations application (com.sn_ap_apm) using the filter criteria and search bar.

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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 are the sample records that describe application features for 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.

Roles installed

Note: The following roles are installed with Finance Common Architecture (com.sn_fin), which is installed as a dependent plugin:

- sn_fin.supplier_payment_info_read: Provides read access to supplier details and supplier payment information tables
- sn_fin.supplier_payment_info_write: Provides write access to supplier details and supplier payment information tables

The sn_shop.invoice_owner role is installed with Source-to-Pay Common Architecture (com.snc.sn_shop), which is installed as a dependent plugin.

For information about the components installed with Invoice Case Management, see Components installed with Invoice Case Management.

Roles

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	• sn_fin.supplier_payment_info_read • sla_manager

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Roles (continued)

Role title [name]	Description	Contains roles
	and invoice exceptions. • Can view purchase orders, supplier details, and supplier payments.	• 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

Flows installed

Flows

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 does not create an invoice processing case.
Start Invoice Processing for Orphan Invoices	Picks up all the invoice records in Draft state that do not have an invoice case associated to 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 PO and Non-PO invoices that are in **PO matching completed/ Accepted** or **Exceptions found** state.

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Tables installed

Tables

Table	Description
Invoice exception [sn_ap_apm_exception]	Stores the exceptions found in the invoices.
Invoice exception line [sn_ap_apm_line_exception]	Stores the line exceptions found in the invoices.
Invoice exception definition [sn_ap_apm_exception_definition]	Extends the Application File table. Stores the exception definitions for an exception.
Invoice processing detail sn_ap_apm_invoice_attribute	Stores invoice processing information

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.

Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Application plugin list

Sequence	Plugin name	Description	Plugin dependencies
1	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]
2	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.	10

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Application plugin list (continued)

Sequence	Plugin name	Description	Plugin dependencies
3	Supplier Collaboration Portal [com.snc.sn_supplier_sp]	Includes demo data and relatedServiceNow Store applications and plugins.	Supplier Common Architecture [com.snc.sn_slm]
4	Glide Virtual Agent	Activate the virtual agent chatbot (chat channel) in the supplier portal for suppliers to complete Accounts Payable Operations related self-service tasks.	
5	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]
6	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]
7	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]
8	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]

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Application plugin list (continued)

Sequence	Plugin name	Description	Plugin dependencies
9	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]
10	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]

Application plugin for AI capabilities in APO

View the consolidated list of plugins required to use AI capabilities for Invoice case management in Accounts Payable Operations.

Important: Before installing a plugin listed in the Plugin name column, ensure that you install all corresponding dependencies listed in the Plugin dependencies column from the ServiceNow Store.

Application plugin list

Bundle	Application	Plugin dependencies
Foundation	app-accounts-payable-gen-ai-foundation	• ServiceNow Otto for Accounts Payable Operations (APO) [sn_ap_gen_ai] • FSC Common Foundation [sn_ai_fsc_fdn]
	app-accounts-payable-gen-ai	• ServiceNow Otto for Platform [sn_genai_platform] • ServiceNow Otto for Finance and

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Application plugin list (continued)

Bundle	Application	Plugin dependencies
		Procurement [sn_fsc_genai] • Invoice Case Management [sn_ap_cm]
Prime	app-accounts-payable-gen-ai-prime	• Accounts Payable Invoice Processing [sn_ap_apm] • APO Foundation [sn_ai_apo_fdn] • Finance and Procurement Prime [sn_ai_fsc_prime]

Run the fix script for Accounts Payable Operations

Run the fix script for successful installation of Accounts Payable Operations.

Before you begin

- Install `Accounts Payable Invoice Processing` plugin.
- Run fix script for Insufficient funds (header amount variance) exception to work.
- Set the **Application scope** to **Source-to-Pay Common Architecture**.
- All the invoices associated with purchase order must be available in the system for Insufficient funds (header amount variance) exception to work.
- Ensure that invoices have same currency as that of associated with purchase order currency for exception to run successfully.
- You can run the fix script in batches by adding the command `gr.setLimit(100000)` after the command line `gr.addEncodedQuery("in_process_invoiced_amountISEMPTY"`. Run the script in batches of 100k or 200k.
- Ensure POs are updated with **In process invoice amount**and **Invoice amount** fields.

> **Note:** If fix script is not executed for POs, then Insufficient funds (header amount variance) exception associated with a invoice will not work.

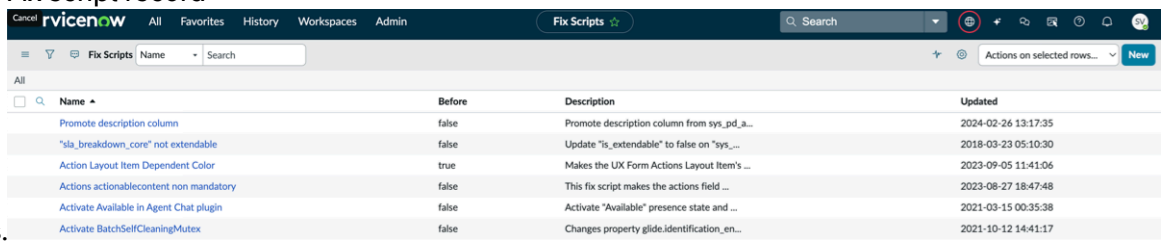
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix scripts**.
2. Click **New**.

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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;
        }
        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);
```

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```
    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;
}
```

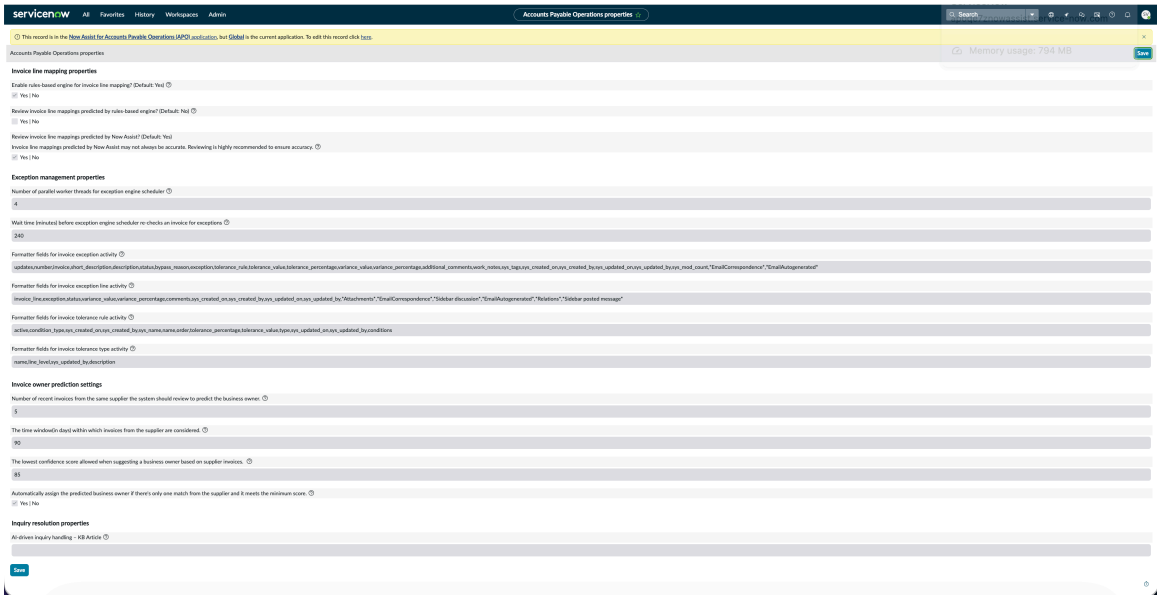
5. Click **Submit**.
6. In the fix script list view, search and select `Update PO Invoiced Amounts for APO` fix script.
   The `Update PO Invoiced Amounts for APO` fix script opens.
7. Select **Run Fix Script**.
   A pop-up window appears with options to **Cancel**, **Proceed** and **Proceed in Background**.
8. Click **Proceed in Background**.

Set APO properties

Use the APO properties form to set the parameters that control the invoice line mapping, invoice ingestion API and exception management.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Properties**.
   The Accounts Payable Operations properties page appears. You are prompted with a message, "This record is in the Accounts Payable Invoice Processing application, but Global is the current application. To edit this record, click here." On selecting, you are prompted with a message, "You are editing a record in the Accounts Payable Invoice Processing application."
2. If you aren't able to edit the property in the current application scope, select the word here in the message at the top of the page.
   You are prompted with a message, "You are editing a record in the Accounts Payable Invoice Processing application."
3. If you don't want to proceed, select **Cancel**.
4. Select **Save**.
   The changes to the application scope are saved. For more information on the form view options available for admin, AP admin and integrator roles, see Accounts Payable Operations properties.

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.

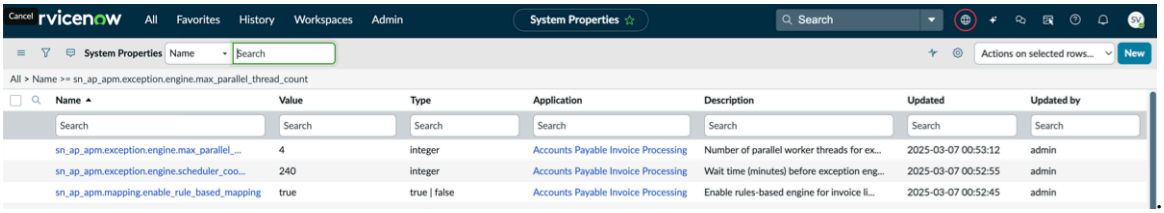
Before you begin

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.

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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. Search `sys_properties_list.do` and open the system property.
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 the default value as 240. You can edit the record in editing mode.
4. In the **Value** field, you can enter the value according to your choice.
5. Select **Update**.

Configure Antivirus Scanning

Configure Antivirus Scanning across your instance and at the table level.

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**.

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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:
   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.

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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 APO 3.0, in Use cases `sys_di_task_definition` table, verify OOB Use case – "DO NOT USE- Invoice Processing v2".

Role required: Admin

Procedure

1. Verify if the OOB pre-trained model Use case is available in the `sys_di_task_definition` table.
   Verify if the OOB pre-trained model is used for copying and creating Use cases. The upgrade applies only if the users use OOB Use case – "DO NOT USE- Invoice Processing v2" to create a new use case.
2. Verify the newly added pre-trained model Use case "DO NOT USE - Invoice Processing v3" exists.
3. Execute the following script from the background script in `sn_ap_ic` Accounts Payable Operations integration with Document Intelligence scope.
4. To execute the below script, perform the following steps.

```
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
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
```

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```
tionName(newReadOnlyUseCaseSysId);}else{newParentUseCaseObj["base_trained_model"]=getNewReadOnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId);}varnewParentUseCase=JSON.stringify(newParentUseCaseObj);copyUseCaseGr.setValue("parent_task_definition",newParentUseCase);copyUseCaseGr.update();}functiongetNewReadOnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId){vargr=newGlideRecord("sys_di_task_def_solution_def");gr.addQuery("task_definition",newReadOnlyUseCaseSysId);gr.addQuery("solution_type","be5131acb70a2110cbc68b91ee11a981");gr.query();if(gr.next()){returngr.getDisplayValue("ml_capability_definition_base.solution_name").toString();}else{return"";}}alignParentUseCaseSysIds("54214afa87c32110822cb887cebb35ff","d679b5744736f110d10671dc416d4390");
```

5. Navigate to **All** > **System Definition** > **Scripts - Background**.
6. Set the **In scope** as `sn_ap_ic`.
7. Copy and paste the script in the **Scripts** area.
8. Click **Run Script**.
   - Use cases configured for Invoice processing flow in Accounts Payable Operations integration with Document Intelligence scope `[sn_ap_ic]` only will get upgraded.
   - Use cases will be upgraded if there is at least one trained task that are manually trained by the user from Document Intelligence Workspace.

   Use cases are upgraded with latest model.

Post upgrade tasks for APO

After you upgrade to Washington DC, you must review all the post-upgrade tasks and complete them as needed.

Upgrade configuration for Accounts Payable Operations integration with Document Intelligence

After you upgrade Accounts Payable Operations to the latest version, you must review all the post-upgrade tasks and complete them as needed. Upgrade the copied use case to the latest Document Intelligence model.

Before you begin

Role required: admin

Install the Document Intelligence for Accounts Payable Operations Content Pack from the ServiceNow® Store.

Procedure

1. Select the DO NOT USE- Invoice processing V7 use case as source.
2. Navigate to **All** > **Document Data Extraction Administration** > **Use Cases**.
3. Search for DO NOT USE- Invoice processing V7 and create a duplicate copy using the  icon.
4. Save the copied use case.
   Use the copied use case in flows and task definitions.
5. To upgrade the copied use case to the latest Document Intelligence model, perform the following steps:

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a. Navigate to **All** > **Fix Scripts**.

b. Search for Update DocIntel base_trained_model and select **Run Fix Script**.
The existing copied use case is updated to the latest DI base model.

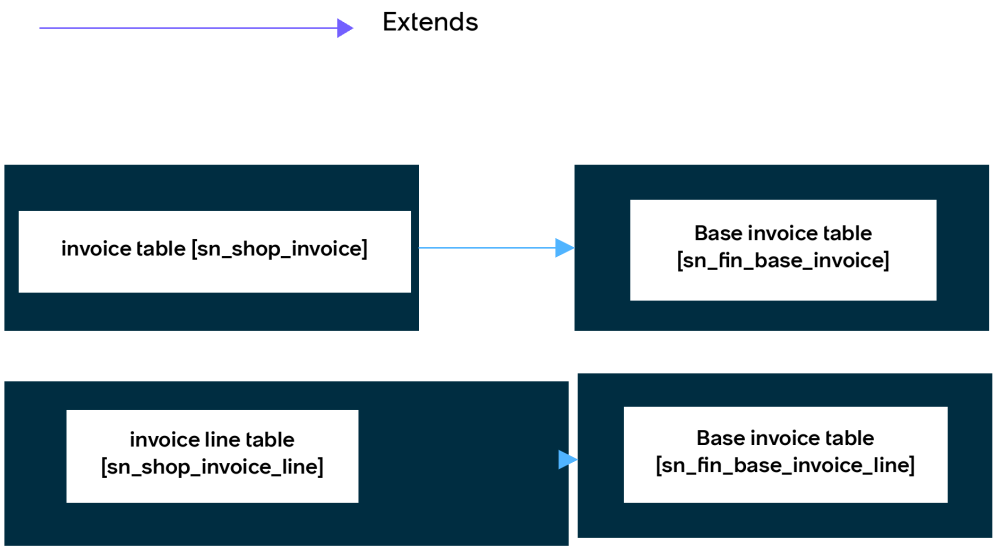
Restructured Invoice table

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].

Invoice Table structure



After you upgrade from Washington DC to Brazil 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 Brazil 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.

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3. Open the fix script record.
4. Enter **Name** as re-parent 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) {
            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);
        }
```

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```
})();
```

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.

Run scheduled job for cost allocation

Run a scheduled job to copy cost allocations from invoice line to purchase order line when upgrading Accounts Payable Operations from lower to higher version.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Scheduled Jobs** > **Update Cost Allocation for the invoice**.
2. Select the **Active** check box.
3. In the script, add the following encodedQuery:

```
var encodedQuery = sn_shop.InvoiceLine.ORDER_LINE +
 'ISNOTEMPTY^' + sn_shop.InvoiceLine.INVOICE + '.' +
 sn_shop.Invoice.STATE + 'IN' + sn_shop.Invoice.STATE_DRAFT
 + ',' + sn_shop.Invoice.STATE_PO_MAPPING_ERROR + "," +
 sn_shop.Invoice.STATE_SUSPECTED_DUPLICATE;
```

4. Select **Save** and **Execute Now**.
   During the upgrade Accounts Payable Operations, cost allocation is auto-updated when purchase order lines are mapped to invoice lines.

Install Invoice Case Management

You can install the Invoice Case Management (com.sn_ap_cm) application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Invoice Case Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Invoice Case Management application installs the following dependent plugins:
  - Source-to-Pay Common Architecture
  - Supplier Collaboration Portal
  - Source-to-Pay Workspace

Role required: admin

About this task

The following items are installed with Invoice Case Management:

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- 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 are the sample records that describe application features for 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 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

Roles

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

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Roles (continued)

Role title [name]	Description	Contains roles
		• 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 jobs

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

Tables

Table	Description
Invoice case [sn_ap_cm_ap_case]	Extends the Service Case table. Stores the invoice case records.
Invoice task [sn_ap_cm_ap_task]	Extends the Service Task table. Stores the invoice task records.

Activate the Create Inquiry Case on Invoice email flow

Activate the **Create Inquiry Case on Invoice email** flow to automatically create an invoice inquiry case based on the information in an inbound email.

Before you begin
Role required: admin

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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.

Components installed with Accounts Payable Operations integration with Document Intelligence

Several types of components are installed with activation of the Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic) application plugin, including user roles, flows, and tables.

Roles required

You must have the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role to review an invoice in Document Intelligence and enter values in the invoice fields.

Flows installed

Flows

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.

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Flows (continued)

Flow	Description
	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.

Tables installed

Tables

Table	Description
Invoice Stage [sn_ap_ic_invoice_stage]	Stores the invoice data extracted from the invoice.
Invoice Line Stage [sn_ap_ic_invoice_line_stage]	Stores the invoice line data extracted from the invoice.

Invoice Processing use case

Accounts Payable Operations integration with Document Intelligence provides the **DO NOT USE - Invoice Processing** use case.

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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. The flow 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.

Invoice processing use case

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. In the use case, invoice date is of data type "Date field". For example, in case of ambiguous date format such as 01-02-2024, the use case (the current use case) interprets the date as month followed by day or vice versa through the DI administration configuration menu. The platform admin [platform_ml_di.admin] manually configures the use case in the DI administration menu. 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 stage and invoice line stage records. It also updates the Invoice stage status to Processing completed.

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:

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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: 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 V3** use case along with its fields, field groups, integrations, flows, and all the related machine learning (ML) models.

Procedure

1. Navigate to **Workspaces** > **All** > **Document Intelligence** > **Document Data Extraction Administration** > **Use cases**.
2. Open the **DO NOT USE- Invoice Processing V3** use case.
3. Select **Duplicate use case** icon ().
   You will be prompted with a message *"Choose the name for this use case"*.
4. Click **Duplicate** button

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- The copy is saved automatically into your environment.
- A copy of the DO NOT USE - Invoice Processing V3 use case is created with the name entered. You can see the copied use case by navigating to **All** > **Document Intelligence** > **Use Cases**.
- A flow named DocIntel Extract Values Flow is created. This flow is suffixed with the name of the copied use case that was created after you clicked the copy () icon. For example, DocIntel Extract Values Flow - name of the entered use case - Invoice Processing v2. You can see this flow by navigating to **All** > **Process Automation** > **Flow Designer** and searching for the flow name.

  You must add the missing information in the newly created flow by copying the existing information from the default DocIntel Extract Values Flow - Invoice Processing v2.0. For more information, see Configure the newly created DocIntel Extract Values Flow.

Result
Copy of the default invoice processing use case is created.

Related topics

Accounts Payable Invoice Processing

Accounts Payable Operations integration with Document Intelligence

Configure the newly created DocIntel Extract Values Flow

Configure the newly created **DocIntel Extract Values Flow - copied use case - Invoice Processing v7** flow to add the missing information by referring to the default **DocIntel Extract Values Flow - Invoice Processing v7** flow.

https://player.vimeo.com/video/1097547868?h=5748107e08&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: admin

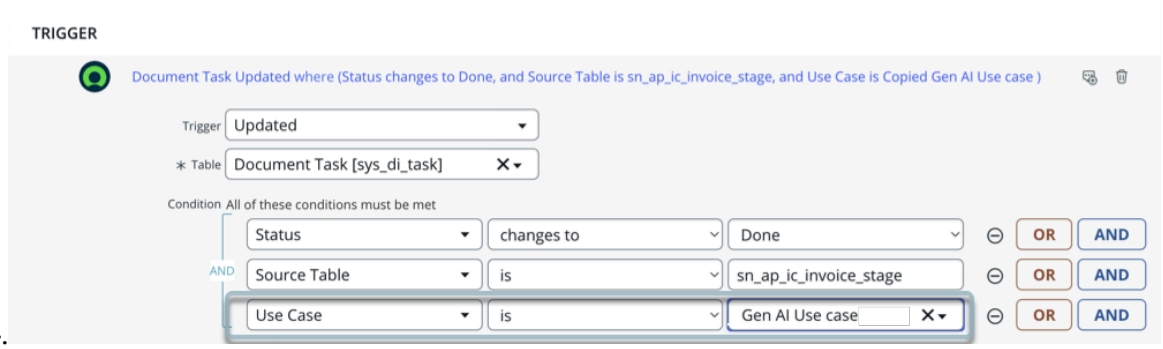
About this task
In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v7** flow, perform the following steps.

Procedure

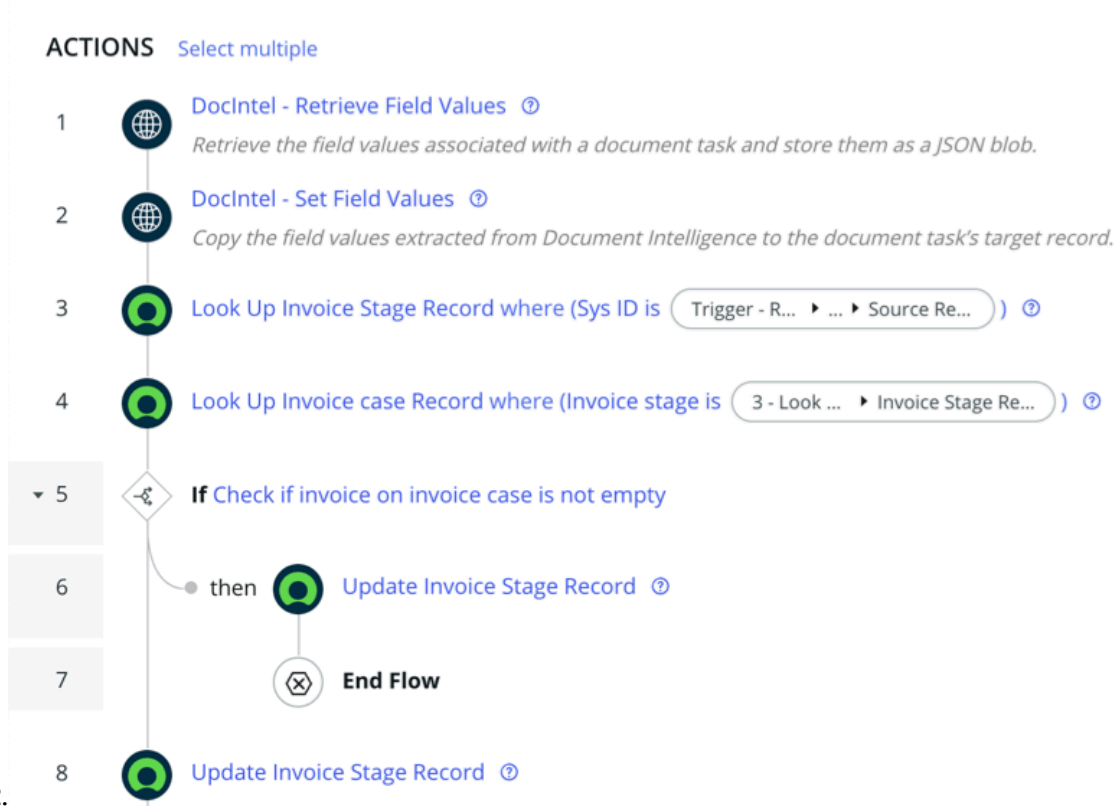
1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **DocIntel Extract Values Flow - Invoice Processing v7** flow.
3. In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v7** flow, under TRIGGER, do the following:

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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**>>.



4. In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v7** flow: under **Actions**, configure new actions similar to **Look up Invoice Stage Record** (action 3), **Look up Invoice Case Record** (action 4), **Condition label : Check if invoice on invoice case is not empty** (action 5, 6, 7) and **Update stage record** (action 8) from flow mentioned in step 2.



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.

https://player.vimeo.com/video/1092942669?h=86d966de3d&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: admin

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About this task

When act  ivated, this flow automatically creates an invoice processing case for an inbound email.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **Invoice processing case for Invoice email** flow.
3. Select the more actions icon () in the top right and select **Copy flow**.
   The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
   A copy of the flow opens.
7. Under TRIGGER, select **Inbound Email**.
8. In the **Trigger** field, leave the trigger as **Inbound Email**.
9. Update the email conditions according to your business requirements.

   Note: Don't activate this flow without configuring email conditions to specify when to create an invoice processing case. Otherwise, an invoice processing case is created for any email that you receive.

10. Select **Save**.
11. Select **Activate**.

Copy and configure the Invoice attachment DI processing flow

Copy and configure the Invoice attachment DI processing flow and activate this flow to use it.

Before you begin

Role required: admin

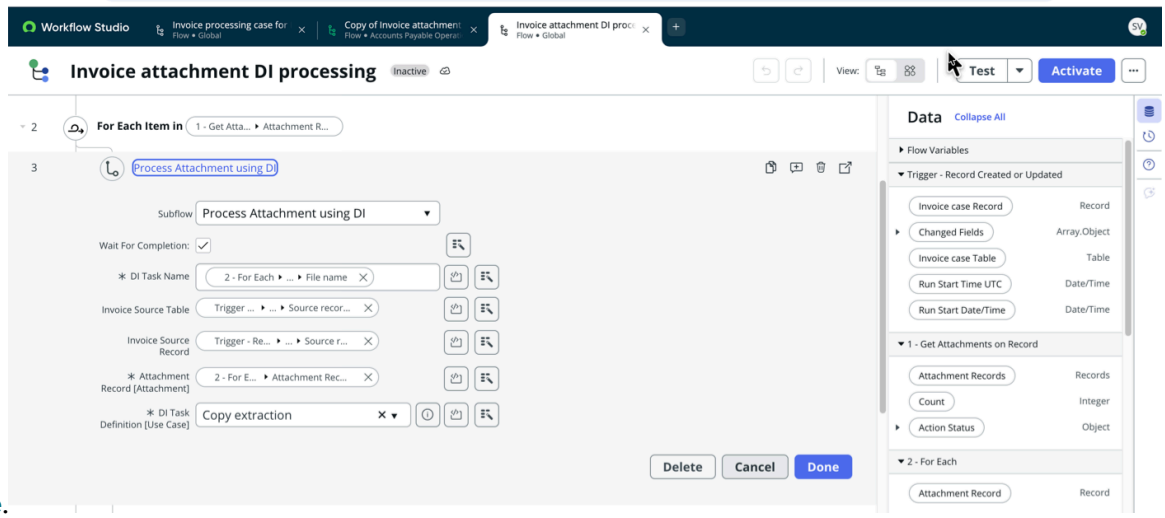
Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **Invoice attachment DI processing** flow.
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. Select the more actions icon ) in the top right and select **Copy flow**.
   The Create a copy of this flow dialog box is displayed.
6. In the **New flow name** field, enter a name for the copied flow.
7. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
8. Select **Copy**.

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A copy of the flow opens.

9. Under TRIGGER, set the trigger conditions for this flow.
10. Under ACTIONS, do the following:
    - Select **Process Attachment using DI** to expand it.
    - In the **SYS DI Task Definition [Use Case]** field, select the copy of the use case that was created using the **Duplicate use case** icon ( ) in Global scope. For more information on copying use case, refer Create a copy of the default Invoice Processing use case.



11. Select **Save**.
12. 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.

https://player.vimeo.com/video/1100004682?h=8cae754d09&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: admin

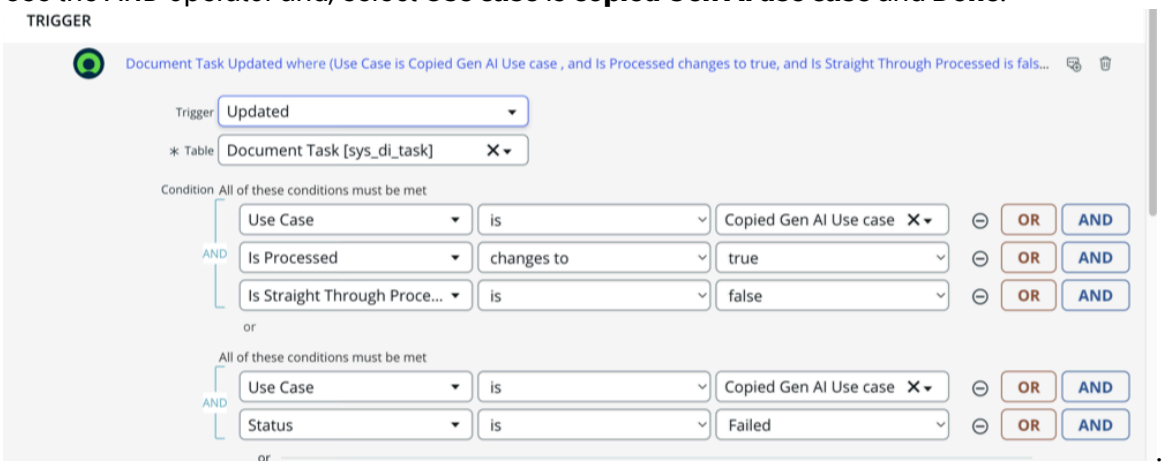
Scope: sn_ap_ic scope.

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. Under **TRIGGER**, in the **Condition** field, copy "DI STP Failed" flow and update trigger condition to reference the use case created by the customer. Use the AND operator and select **Use case** is **copied Gen AI use case** and **Done**.

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Use the AND operator and, select **Use case** is **copied Gen AI use case** and **Done**.



For more information on copying use case, refer Create a copy of the default Invoice Processing use case and Copy and activate the generative AI DocIntel flow.

7. Select **Save**.
8. Select **Activate**.

Copy and configure the Invoice processing case for Invoice email flow when Document Intelligence is not installed

Copy and configure the Invoice processing case for Invoice email flow and add a trigger condition to specify when to create an invoice processing case when Document Intelligence is not installed.

Before you begin
Role required: admin

About this task
The Invoice processing case for Invoice email is the only flow that is available if you don't install the Document Intelligence application. When activated, this flow automatically creates an invoice processing case for an inbound email.

Procedure
1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **Invoice processing case for Invoice email** flow.
3. Select the more actions icon ( ) in the top right and select **Copy flow**.
   The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
   A copy of the flow opens.
7. Under TRIGGER, select **Inbound Email**.
8. In the **Trigger** field, leave the trigger as **Inbound Email**.
9. Update the email conditions according to your business requirements.

> **Note:** Don't activate this flow without configuring email conditions to specify when to create an invoice processing case. Otherwise, an invoice processing case is created for any email that you receive.

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10. Under ACTIONS, do the following:
    a. Select **Accounts payable case Record** to expand it.
    b. Under Fields, in the **DocIntel status** field, select **Not applicable**.
11. Select **Save**.
12. Select **Activate**.

Configure the Invoice processing case for Invoice email flow for disabling the Document Intelligence capability

Configure the copied version of the **Invoice processing case for Invoice email** flow for disabling the Document Intelligence capability.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the copied version of the **Invoice processing case for Invoice email** flow.
3. Under ACTIONS, do the following:
    a. Select **Accounts payable case Record** to expand it.
    b. Under Fields, in the **DocIntel status** field, select **Not applicable**.
4. Select **Save**.
5. Select **Activate**.

Deactivate the Invoice attachment DI processing flow

Deactivate the Invoice attachment DI processing flow when you don't want to use the Document Intelligence capability.

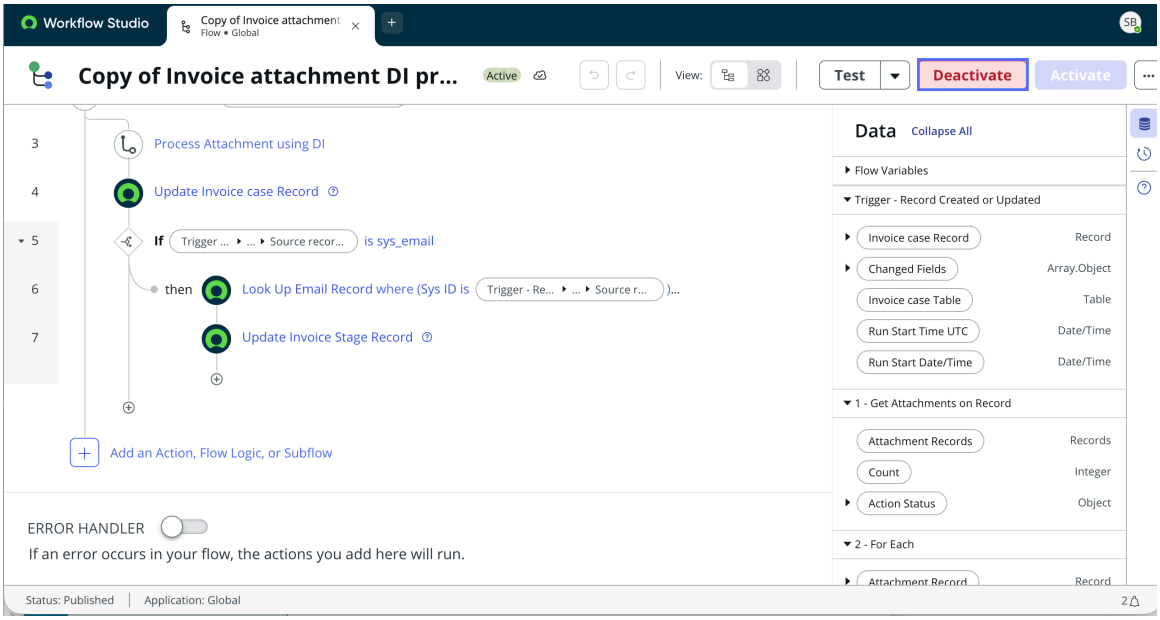
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the copied version of the **Invoice attachment DI processing** flow.

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3. Select **Deactivate**.

Result

The Invoice attachment DI processing flow is deactivated.

Related topics

Accounts Payable Invoice Processing

Accounts Payable Operations integration with Document Intelligence

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 must open the invoice and manually enter the required values. The Accounts Payable Specialist then submits the invoice.
     - If the required fields are populated on the invoice, the invoice is auto-submitted.

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- 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:

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 must open the invoice and manually enter the required values. The Accounts Payable Specialist then submits 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 must open the invoice processing case and enter the correct currency code in the invoice fields. The Accounts Payable Specialist then submits the invoice. For more information, see Invoice data transformation logic.

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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.

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:

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- 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 conversion logic

Date format in the incoming invoice	Converted date format
2nd Sep, 2022	2022-09-02
3rd September, 2022	2022-09-02
02-Sep-2022	2022-09-02
02-Sept-2022	2022-09-02
Sept-02-2022	2022-09-02
Sep-02-2022	2022-09-02
09-02-2022	2022-09-02
02-09-2022	2022-02-09
09/02/2022	2022-09-02
02/09/2022	2022-02-09

Currency conversion logic

The application supports different locale such as US, European and Indian number systems. For example, "X,XXX.XXX", "X.XXX,XX", "XX,XX.XXX" where X is a single-digit positive number.

Currency conversion logic

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

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Currency conversion logic (continued)

Scenario	Currency format in the incoming invoice	Converted currency format
Amount followed by the currency code without any space	76EUR	76 EUR
Amount followed by the currency symbol without any space	76€	76 EUR
Currency code followed by the amount without any space	EUR76	76 EUR
Currency symbol followed by the amount without any space	€76	76 EUR

The application first looks for the active unique currency code in the Currency [fx_currency] table when an incoming invoice amount has a currency symbol or code. If multiple currency matches are found or the incoming invoice amount has no currency code or symbol, then the application runs the defaulting currency logic depending on the invoice type as follows.

- PO invoice - Searches for purchase order and related currency, and sets the invoice currency to purchase order currency. In case of missing purchase order or related currency, the invoice currency is set to system currency.
- Non- PO invoice - Searches for legal entity and local currency, and sets the invoice currency to the legal entity's local currency. In the case of missing legal entity and local currency, the invoice currency is set to system currency.

Unit Price conversion logic

The application supports different locale such as US, European and Indian number format locale. For example, "X,XXX.XXX", "X.XXX,XX", "XX,XX.XXX" where X is a single-digit positive number.

If the incoming invoice unit price consists of currency symbol or code present in Currency [fx_currency] table, then the unit price is converted. For example, $ XX,XXX,XXX.XX or USD XX,XX,XXX.X, where X is a single-digit positive number.

Unit Price conversion logic

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.

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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 a single decimal separator, then conversion doesn't apply for the invoice, and the value is set to empty as shown in the following table.

For more information on currency conversion, see Currency administration.

Decimal conversion logic

Decimal format mentioned in the incoming invoice	Converted decimal format
1,000,25.10	100025.10
1,00,025.10	100025.10
100,251	100,251
10.102,510	10102.51
10.10.102,510	1010102.51
100,251	
100.251	

Logic to fetch reference field values

Reference field value logic

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:

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Reference field value logic (continued)

Reference Field	Logic to fetch the field value
	• 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: • 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. • If the invoice contains negative amount or negative quantity, then the DocIntel transformation logic is updated to extract negative amounts where the negative sign is either: ○ Present after the value (header or line level) ○ Present within a bracket (header or line level) In such cases, the invoice is considered as of type Credit memo.

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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.

Use 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.

Create new article form

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.

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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 article.
Article body	Detailed description of the article.

4. **Optional:** To check if any duplicate articles are available with similar short descriptions, select **Search for Duplicates**.
5. Do one of these actions.

Action	Description
Submit	To submit an article for review, select **Submit**.
Save	To save an article, from the Additional actions menu, select **Save**.

What to do next

- View your submitted articles by navigating to **Knowledge** > **My Knowledge Articles**
- Track the progress of your article from **My Knowledge Articles**.
- Manage the article workflows, such as reviewing, publishing, updating, or retiring the article.

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 • Expedite payment request • Payment terms issue • Invoice entry assistance	Agent [sn_ap_cm.agent]	You can view the invoice inquiry cases in the Source-to-Pay Workspace. For more information, see Invoice inquiry cases.

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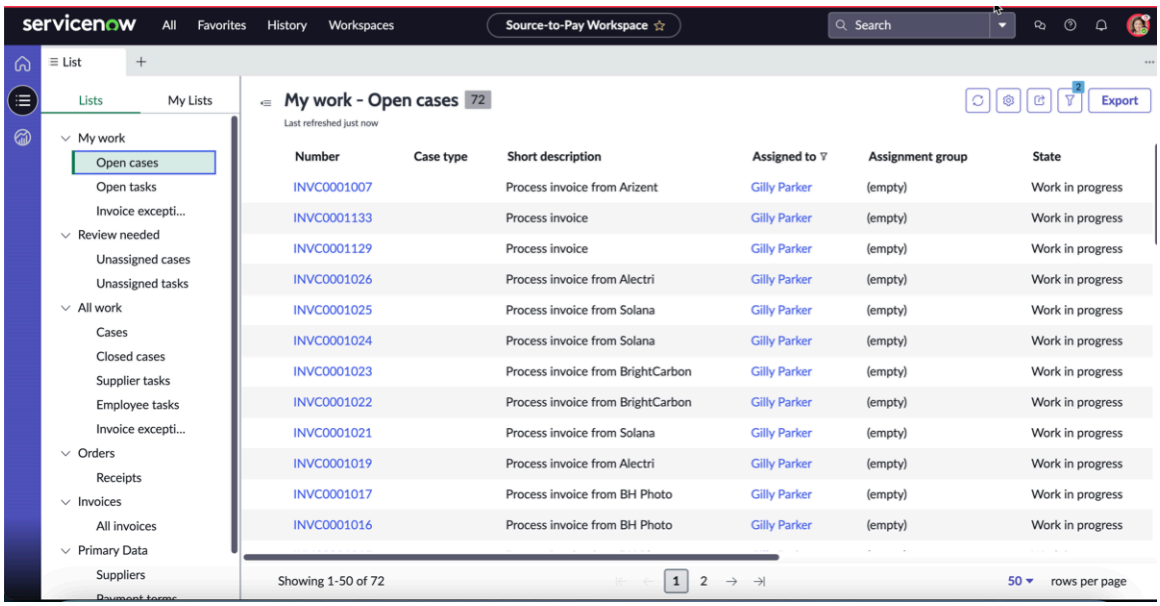
Account Payables cases (continued)

Category	Subcategory	Role	Description
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:

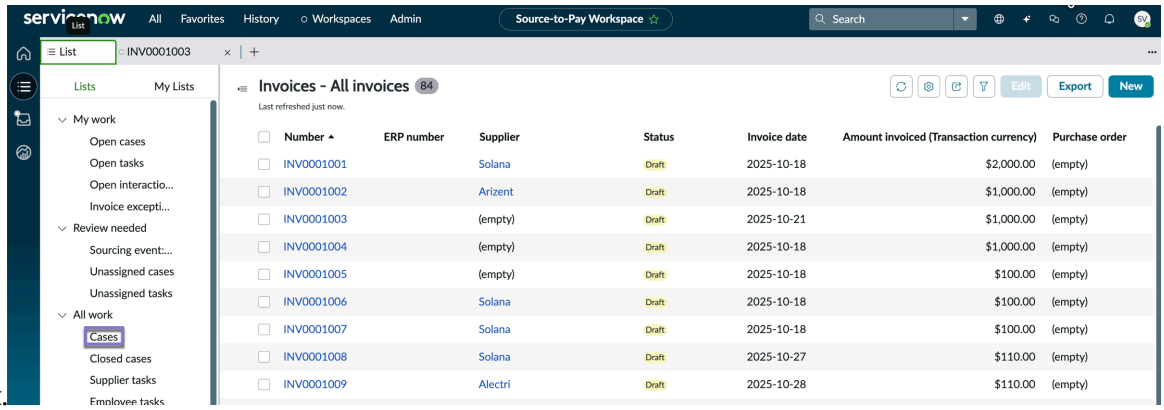
1. Navigate to **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:
   - As an Accounts Payable Specialist:
     - Navigate to **Lists** > **My Work** > **Open cases**
     - Navigate to **Lists** > **All Work** > **Cases**.

   Open invoice cases under My work.



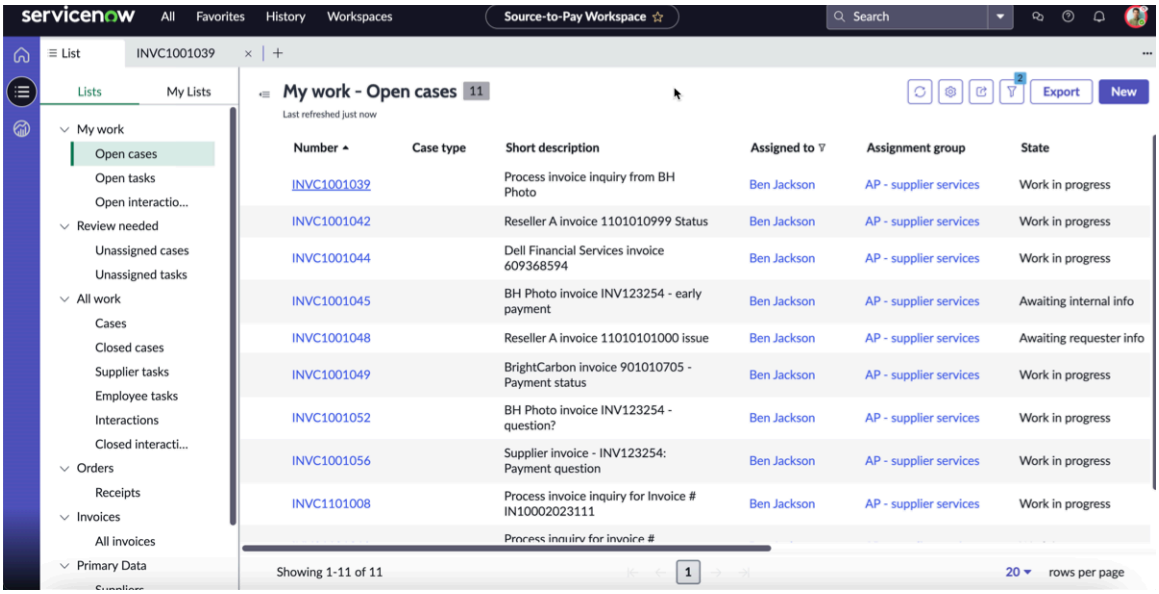
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All invoice cases under All work.



- As an agent, you can view inquiry cases:
  - Navigate to **Lists** > **My Work** > **Open cases**
  - Navigate to **Lists** > **All Work** > **Cases**

    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.



Using Invoice Case Management

Agents can use Invoice Case Management to manage and work on invoice inquiry cases raised by employees and suppliers to resolve issues related to invoices.

Invoice inquiry cases

Invoice inquiry cases help you resolve invoice-related issues raised by the suppliers or employees.

When you receive an email for an inquiry, the application automatically creates an invoice case with a category of **Inquiry** and one of the following sub-categories:

- **Payment inquiry**
- **Invoice inquiry**
- **Expedite payment request**

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- **Payment terms issue**
- **Invoice entry assistance**
- **Other**

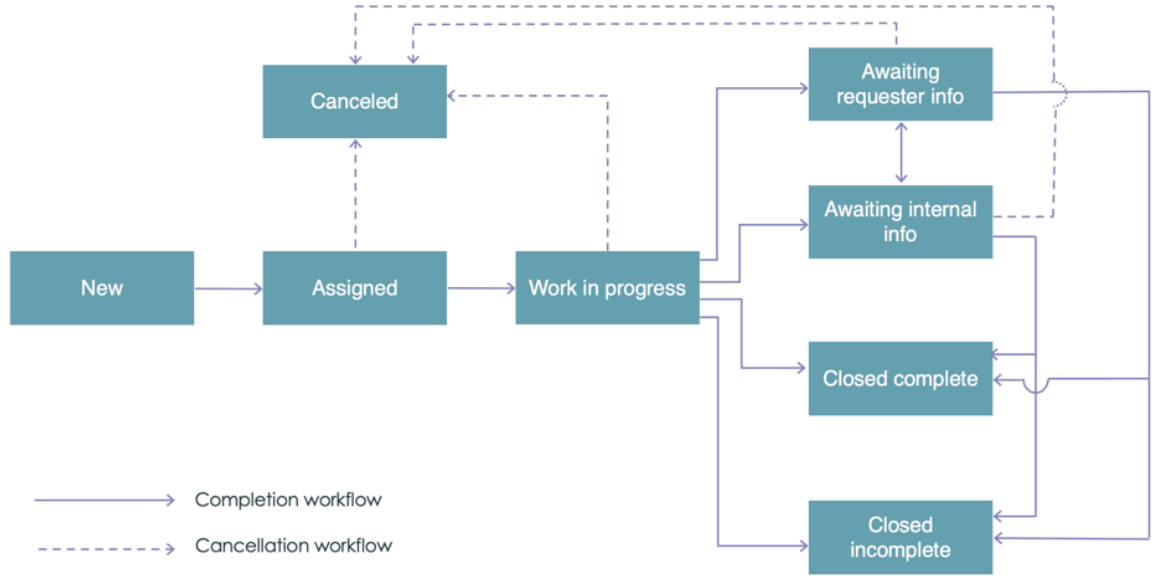
Note: An invoice case with a category of **Inquiry** is referred to as an invoice inquiry case.

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.
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**.

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Invoice inquiry case states (continued)

State	Description
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

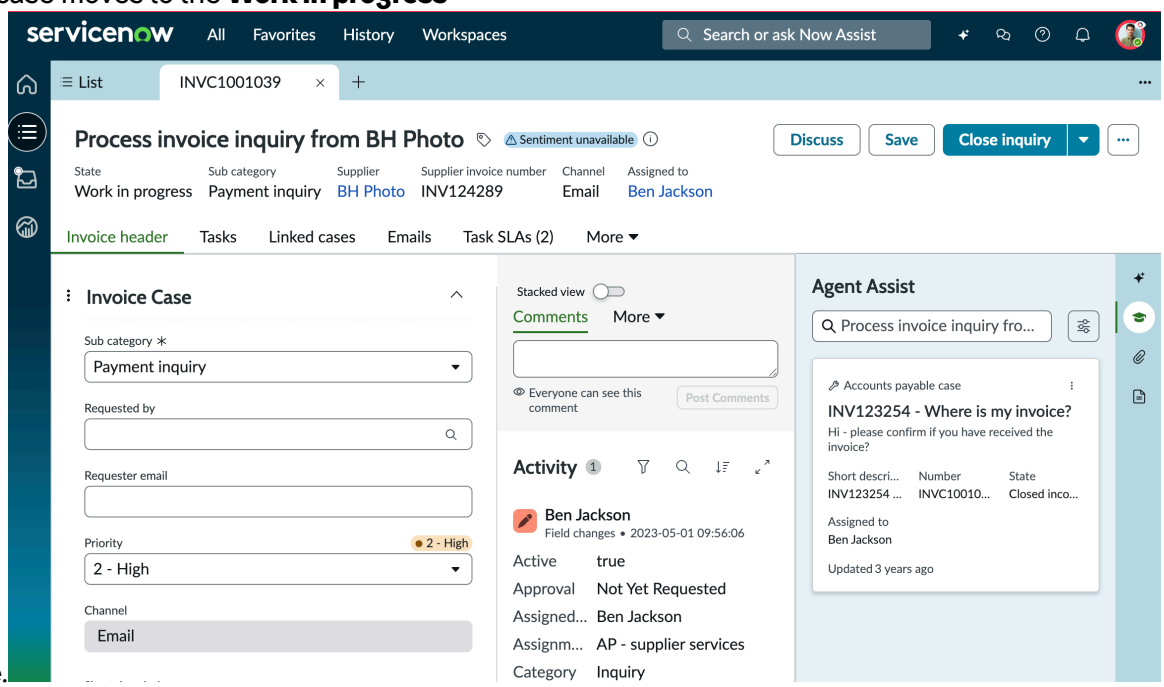
An invoice case with a category of Inquiry is referred to as an invoice inquiry case.

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** > **Open cases**.
   - Navigate to **Lists** > **All Work** > **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.



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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.
   - The state of an inquiry case changes from Awaiting requester info and Awaiting internal info to Work in progress in the following scenarios:
     - An email reply from a requester triggers an action to move the inquiry case state to Work in progress.
     - When all inquiry tasks are closed, the inquiry case state is automatically changed to Work in progress.
     - An agent can manually change the inquiry state from Awaiting requester info to Work in progress.
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.
   The inquiry case and related tasks are closed successfully.

Create an invoice inquiry case manually

Create invoice inquiry cases to address and respond to questions related to invoices and payment.

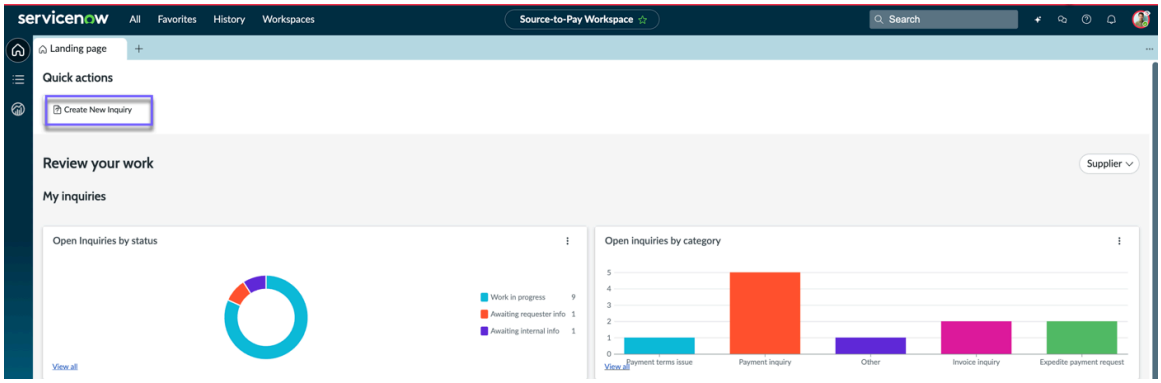
Before you begin
Role required: sn_ap_cm.agent or sn_ap_cm.admin

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**.

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3. On the Create New Invoice case form, fill in the fields.
   For a description of the field values, see Create New Invoice case form.
4. Select **Save**.

Create an invoice task

Create an invoice task and assign it to a user or group to resolve an invoice inquiry case.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All** > **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:
   - **Lists** > **My Work** > **My open invoice inquiry cases**
   - **Lists** > **All Work** > **All open invoice inquiry cases**
4. In the Number column, select the link for an invoice inquiry case to open it.
5. Select the **Tasks** tab and then select **New**.
6. On the Create New Invoice task form, fill in the fields.
   For a description of the field values, see Create New Invoice task form.
7. Select **Save**.

Request additional information from the requester for an invoice inquiry case

Request additional information from the requester to continue working on the case.

Before you begin

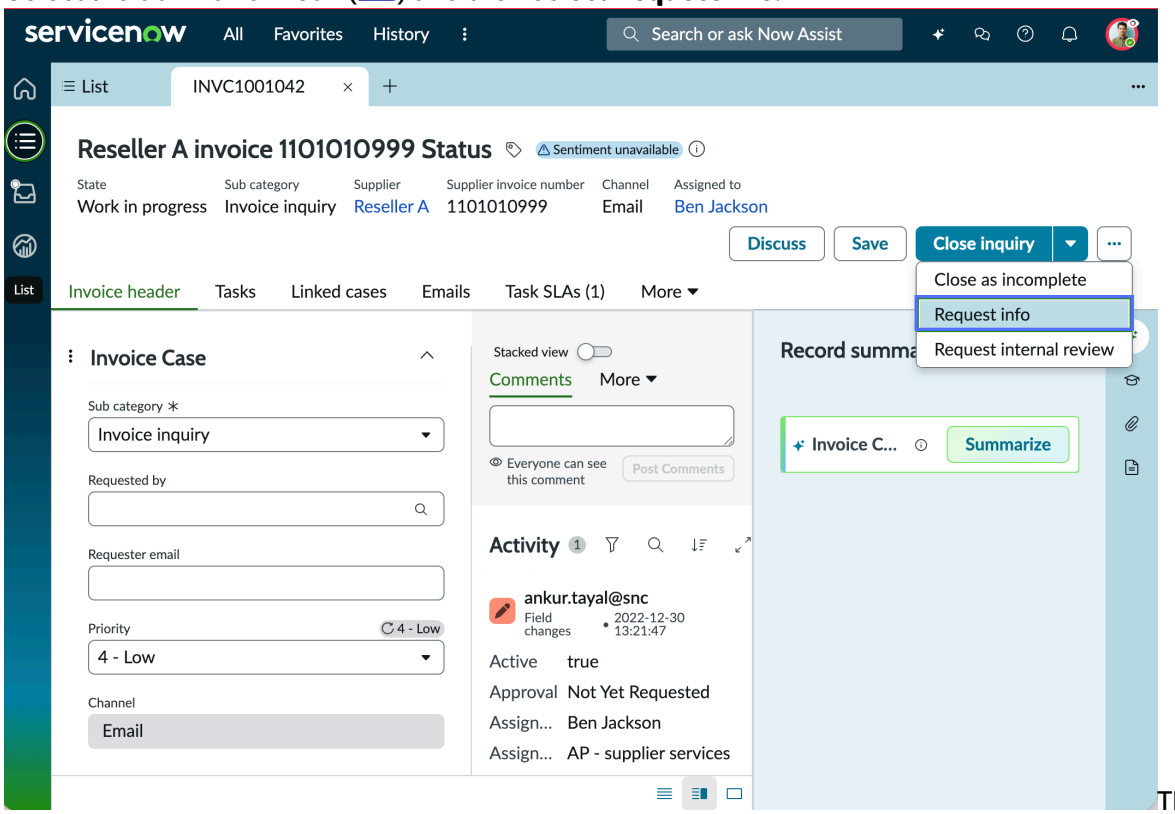
Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:
   - Navigate to **Lists** > **My Work** > **My open invoice inquiry cases**.
   - Navigate to **Lists** > **All Work** > **All open invoice inquiry cases**.
4. In the Number column, select the link to the case to open it.

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5. Select the down arrow icon ( ) and then select **Request info**.



The Request info dialog box is displayed.

6. In the **Reason** field, enter the information that you need from the requester.
7. Select **Request info**.
   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

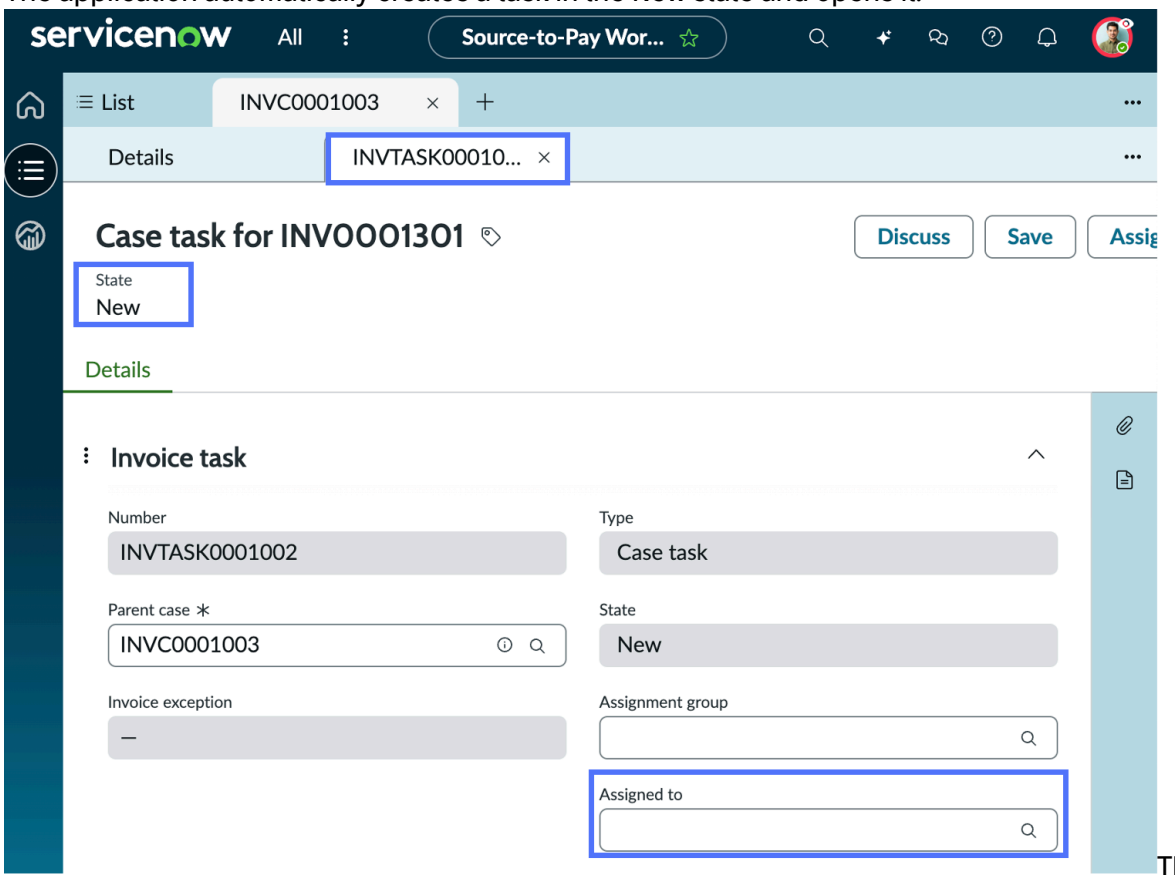
Role required: sn_ap_cm.agent or sn_ap_cm.admin

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**.

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The application automatically creates a task in the New state and opens it.



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**.
   The state of the case updates to **Awaiting internal info**.

Close an invoice inquiry case

Close an invoice inquiry case when all the activities and tasks for resolving the case are completed.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:
   - Navigate to **Lists** > **My Work** > **My open invoice inquiry cases**.
   - Navigate to **Lists** > **All Work** > **All open invoice inquiry cases**.
4. In the Number column, select the link to the case to open it.
5. Do one of the following:

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- 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.

Reopen a closed inquiry case

Reopen a closed or cancelled invoice inquiry case to continue working on it instead of creating a new one. Reopening preserves the full case history, so you can correct details, send a follow-up email, or resume the conversation on the existing case.

Before you begin
Role required: APO CM agent

Procedure
1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Invoices** > **All Invoices**.
4. Open an invoice in **Closed** or **Cancelled invoice inquiry** state.
5. Select **Reopen**.

Result
The case state reverts to **Work in Progress**. All previous case activities, field changes, and communication history remain visible and accessible, so you can continue working on the existing case.

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.

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Invoice ingestion using the AP Invoice API

The `AP Invoice` API enables bulk import of AP invoices from external systems, such as supplier billing platforms and OCR solutions, into Accounts Payable Operations using cXML, JSON, or XML.

Invoice ingestion via API requires the Accounts Payable Invoice Processing (com.sn_ap_apm) and Source-to-Pay Integration Framework (sn_spend_intg) applications, which are available on the ServiceNow Store.

The system property [ap.invoice.create.api.record_limit] enables users to set the maximum number of invoices that can be processed in a batch using the AP invoice create API.

The Rate limit AP invoice xml defines the maximum number of API calls invoked by external systems according to hour.

The APO application verifies that users have valid authorization to access the APIs.

Look up logic for reference fields is enhanced for invoices ingested via APIs and integration. The reference fields are:

- Purchase order
- Legal entity
- Currency field
- Country
- Line quantity
- Line unit price

For more information about the `AP Invoice` API, see:

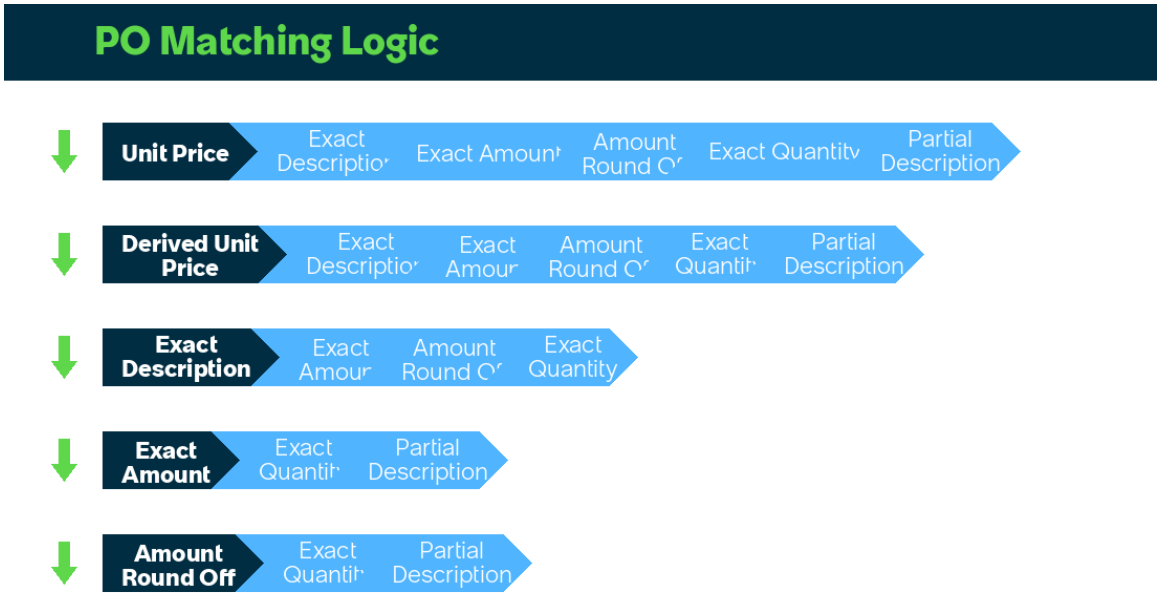
- AP Invoice API reference
- AP Invoice API Developer Guide

Rules based engine

The rule based engine maps the invoice line with purchase order line using fields such as unit price, delivered unit price, exact description, exact amount and amount round off.

The digitized invoice in accepted state moves to suspected duplicate state where the AP specialist verifies if the invoice is duplicate or not. When the invoice is confirmed to be not duplicate, the state of the invoice changes to received. The rules-based engine maps the fields in invoice such as unit price, derived unit price, exact description, exact amount and amount round off with the purchase order lines. If the invoice fields doesn't match with any of the fields in the purchase order lines, then the invoice state changes to matching error.

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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.

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:

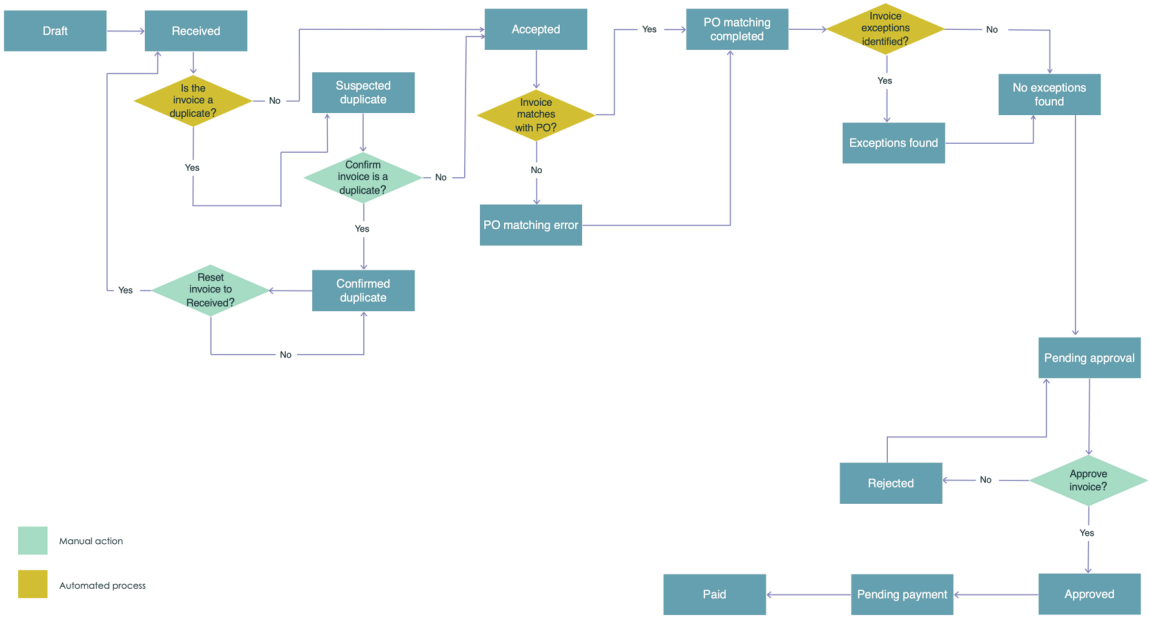
1. Navigate to **Accounts Payable Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Invoices**.

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.

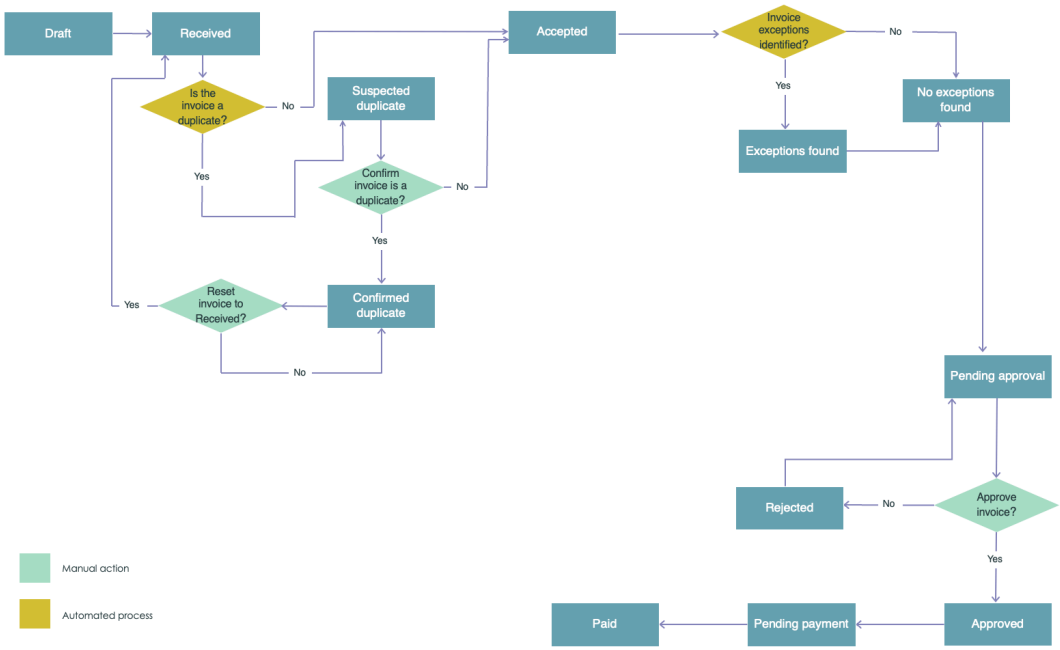
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Invoice life cycle



Non-PO invoice life cycle

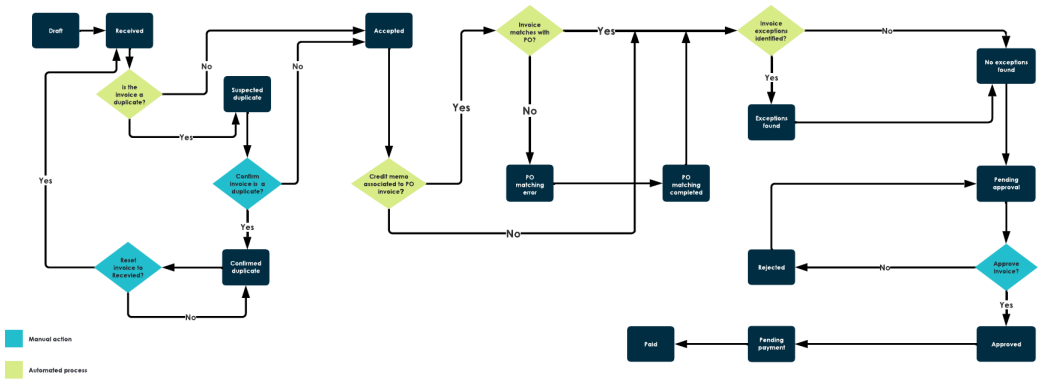
The following figure illustrates the various statuses and sub-statuses that the non-PO invoice goes through during its life cycle, from its creation to approval.



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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

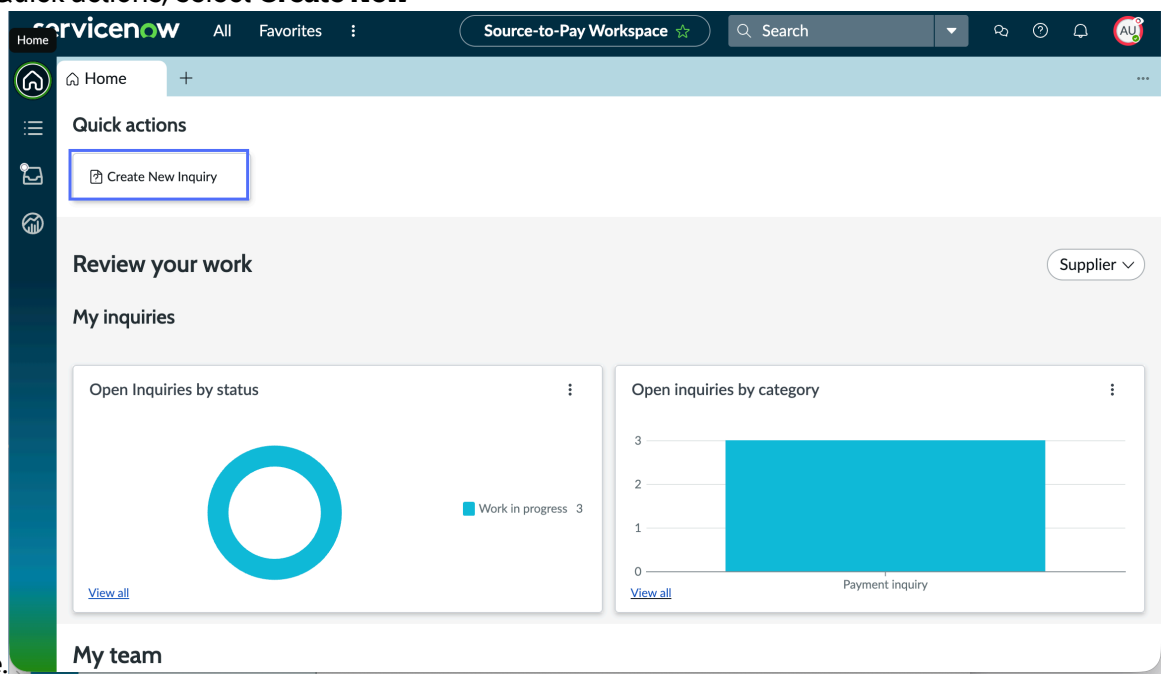
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

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** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Create New Invoice**.



3. On the Create New Invoice form, fill in the fields.
   For a description of the field values, see Create New Invoice form.

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4. Select **Save**.
   A new invoice is created in the Draft state, a new invoice case is created with a category of Invoice automation and sub-category of Invoice processing, and the new invoice is associated with the invoice case.

   For more information about working with an invoice processing case, see Work on an invoice processing case.

What to do next
Create invoice lines for the invoice. For more information, see Create an invoice line manually.

Create an invoice line manually

Create invoice lines manually for an invoice when the invoice automation process doesn't capture this information from an incoming invoice.

Before you begin
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure
1. Navigate to **All** > **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Navigate to **Lists** > **Invoices** > **All Open Invoices**.
3. In the Number column, select the link to the invoice that you want to create an invoice line for.
4. Select the **Invoice lines** tab and select **New.**
5. On the Create New Invoice Line form, fill in the fields.
   For a description of the field values, see Create New Invoice Line form.
6. Select **Save**.

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.

For more information on invoices ingested using document intelligence, see Invoice data transformation logic.

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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, the invoice moves to PO matching completed status. 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. The message confirms 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. When cost is split across multiple cost centers, the cost center field on the invoice line becomes read-only and allows one type of allocation type in cost allocations. 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

- You can create a new invoice line record and cost allocation record only when the invoice is in draft state or exception found state.
- During cost allocation, confirm that the total allocated quantity or amount across different cost centers or ledger accounts equals the invoice line quantity or subtotal. Otherwise, an 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.
4. Select **Cost allocations**.

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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.
   - When you select allocation type as cost center for the first record and save the changes, the subsequent records also will inherit the same allocation type.

6. Select **Save**.

Result
The cost allocation form is added to the invoice line.

Distribution set in Accounts Payable Operations

Distribution set in Accounts Payable Operations is a collection of predefined rules, including template, designed to automate the allocation of costs for invoice lines across cost centers and GL accounts.

By applying a distribution set, Accounts Payable teams can efficiently generate cost allocation records automatically, eliminating the need for manual cost splitting for each invoice line.

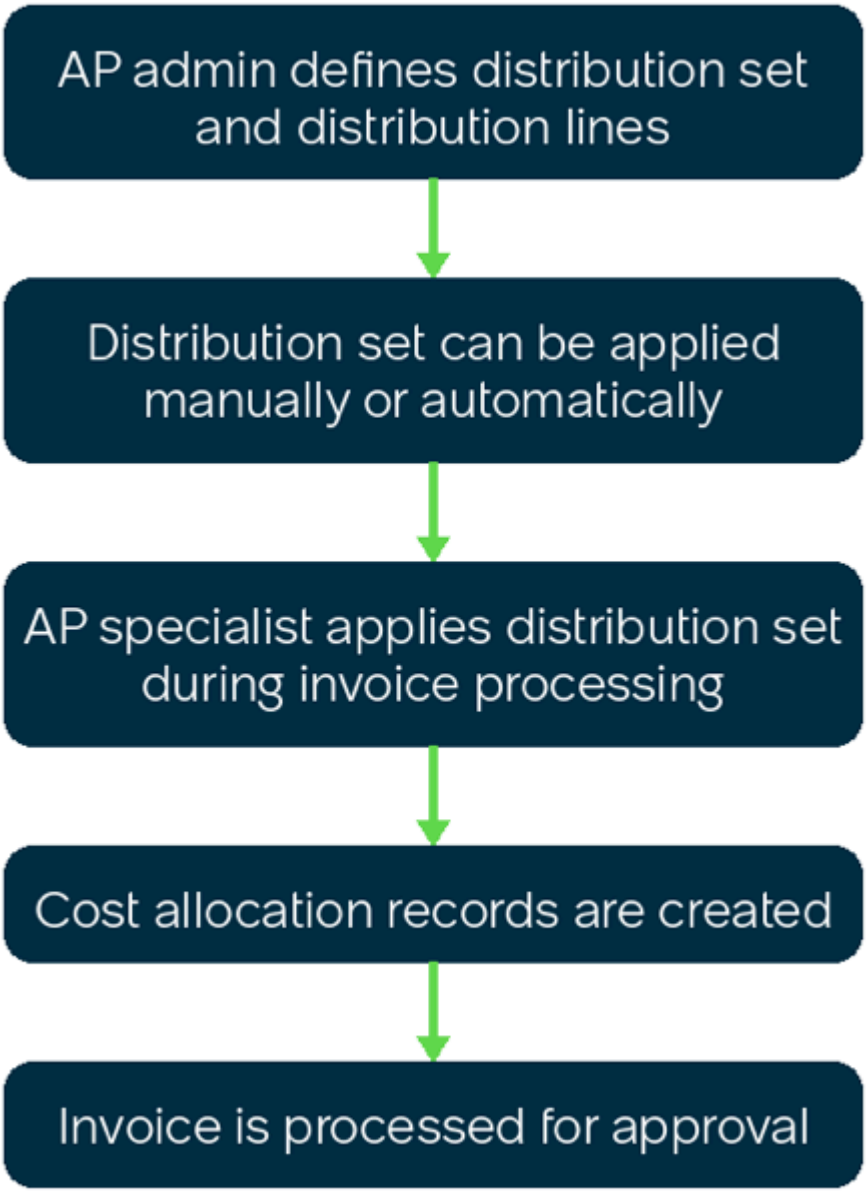
The key features of the distribution set are:

- AP Admin can define distribution sets and add distribution lines with varying percentages across cost centers or general ledger accounts.
- Distribution sets can be end-dated by specifying an effective-to-date. After expiration, they'll no longer be automatically applied to invoice lines according to the invoice date.
- A distribution set can be marked as a template to automate creation of cost allocation records without amounts.
- The template feature in the distribution set automatically generates cost allocation records for invoice lines, and also enables AP specialists to divide costs by allocation type, such as cost center or general ledger account. Any over or under allocation will be flagged during the exception stage.
- For non-template-based distribution sets, the AP administrator must input allocation percentage so that the total sums to 100% and the distribution set becomes auto-active. If the total doesn't sum to 100%, then the distribution set remains inactive.
- An AP administrator is able to establish filters or rules that automatically assign distribution sets throughout the invoice processing workflow, thereby eliminating the requirement for manual selection.
- AP specialist can manually select a distribution set during the processing of an invoice.
- Reduces the risk of cost allocation errors.
- Distribution sets apply to both PO and Non-PO invoices.

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- Speeds up the invoice processing by reducing manual work by AP specialists.

The workflow of the distribution set is shown below:



The key features of distribution lines are:

- Distribution lines can be associated with either cost centers or general ledger accounts; however, they can't be linked to both at the same time.
- Duplicate distribution lines aren't enabled.
- Allocation type is restricted to amount percentage for each distribution line.
- When the distribution set is set as a template, the percentage column is read-only, and AP specialists can manually allocate costs later.

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Allocate costs using distribution set

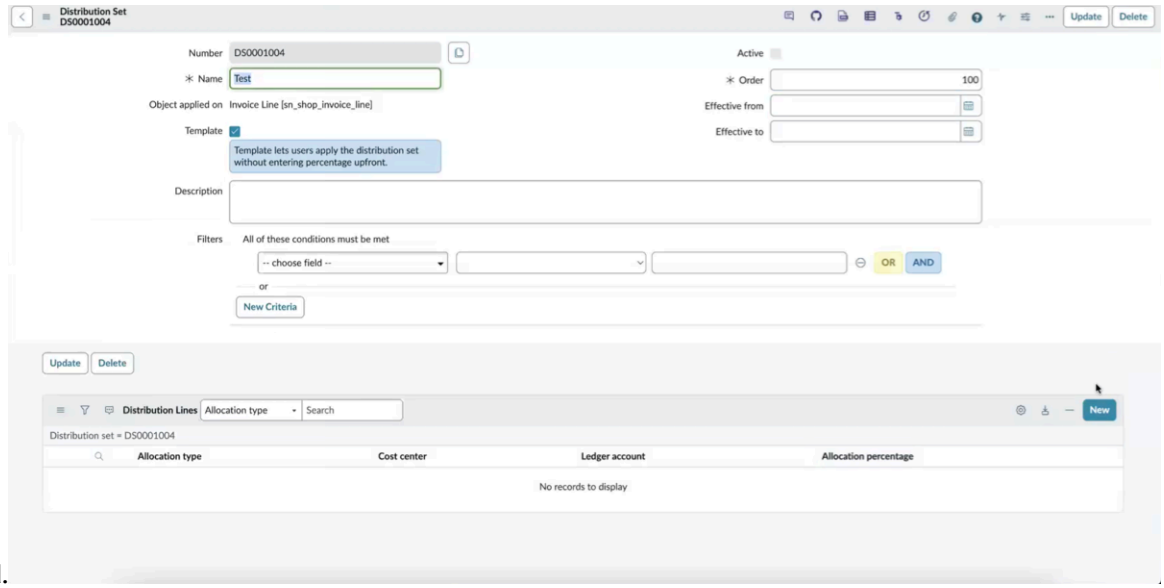
Define a distribution set to split cost allocations automatically for invoice lines with allocation type as cost center or general ledger account.

Before you begin

Role required: sn_ap_apm.admin

Procedure

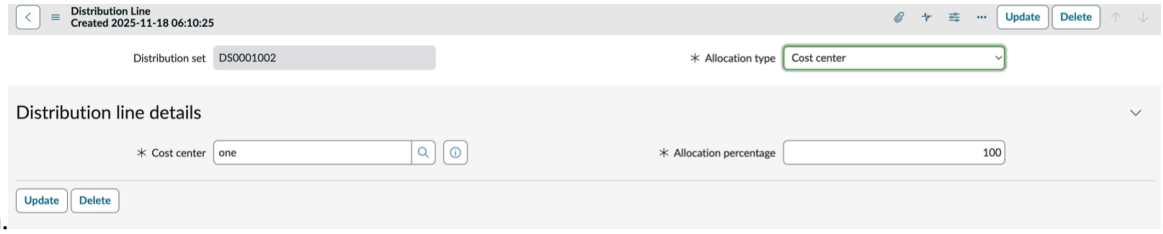
1. Navigate to **Source-to-Pay workspace** > **All** > **Accounts Payable Operations** > **Distribution Sets**.
2. Select **New**.
   The distribution set form view appears. For more information on the form, see Distribution set form
3. Select the **Template** check box if you want the distribution set to be applied as a template to the cost allocation record.
4. Select **Save**.
   The **Convert Template** pop-up appears. You'll be prompted with a message "Converting this distribution setup to a template removes all allocation percentage from the distribution line. This action can't be undone".
5. Select **Create template**.
   For distribution set with template, if there's distribution lines created, by default, the distribution set is active. For non-template, if the allocation percentage doesn't sum upto 100%, then the distribution set remains inactive else it is saved as active.
6. Select **Submit**.
   The distribution set is created.



7. Select the distribution set for which you want to create distribution lines.

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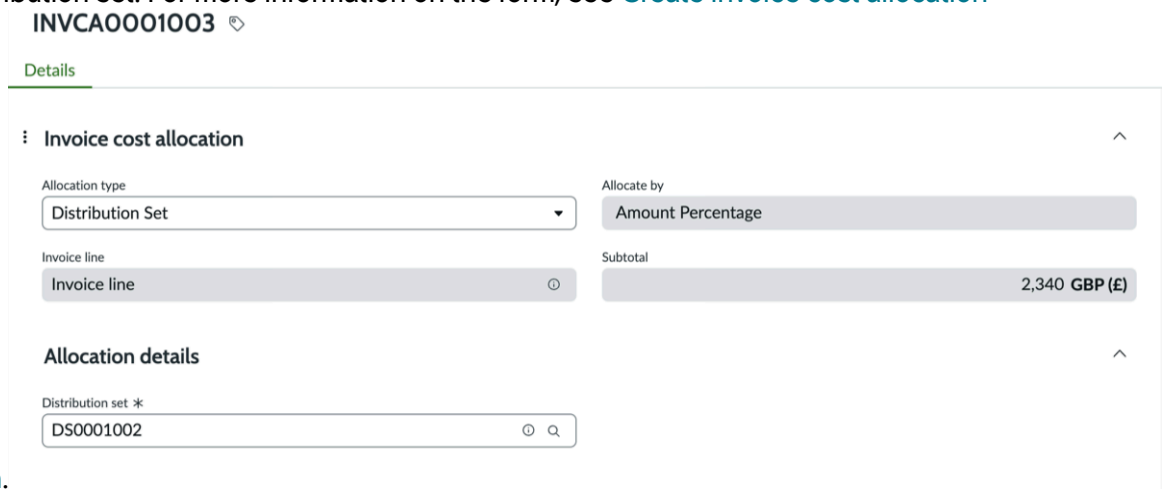
a. Select **New**.
A distribution line form appears. For more information on the distribution line form, see Distribution set form.



b. Allocate the cost and split the invoice line amount by cost center or general ledger account.

c. Select **Submit**.
After a distribution line is submitted, it's applicable for new invoices only and unavailable for existing invoices.

8. To apply distribution set manually for an invoice line, select **Invoice line**> **Cost allocation**> **New**.
Create a New Invoice cost allocation form appears. You can choose **Allocation type** as Distribution set. For more information on the form, see Create invoice cost allocation form.



If a distribution set is created for cost center, then for subsequent cost allocation, the allocation type is cost center by default.

If a distribution set is created for general ledger account, then for subsequent cost allocation, the allocation type is general ledger account by default.

9. Select **Save**.

Result

Distribution set automates cost allocations. Each cost allocation record displays the source whether it's entered manually, derived from a purchase order, or associated with a specific distribution set number confirming complete traceability.

Related topics

Create invoice cost allocation form

Tax calculations

Calculate the final tax for an invoice based on the tax type and the tax tolerance variance.

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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 undertax 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.

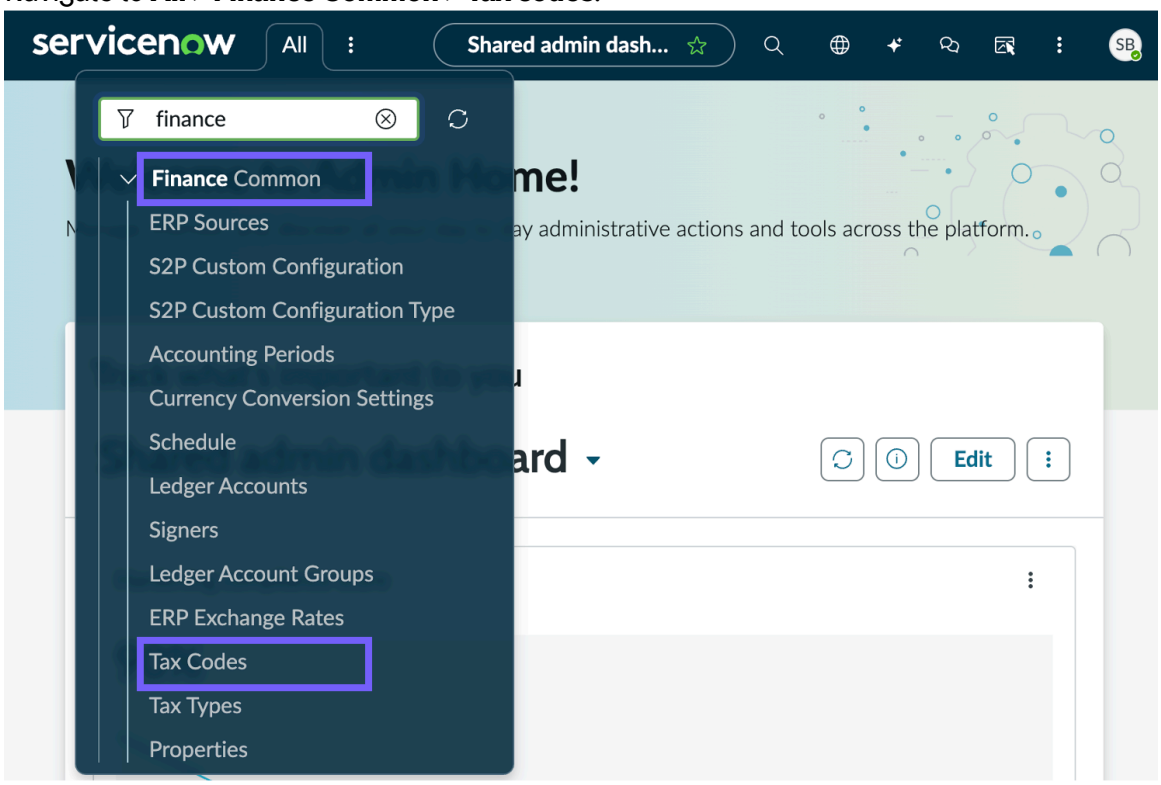
Create tax codes to be added in an invoice

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 Code 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 used 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.

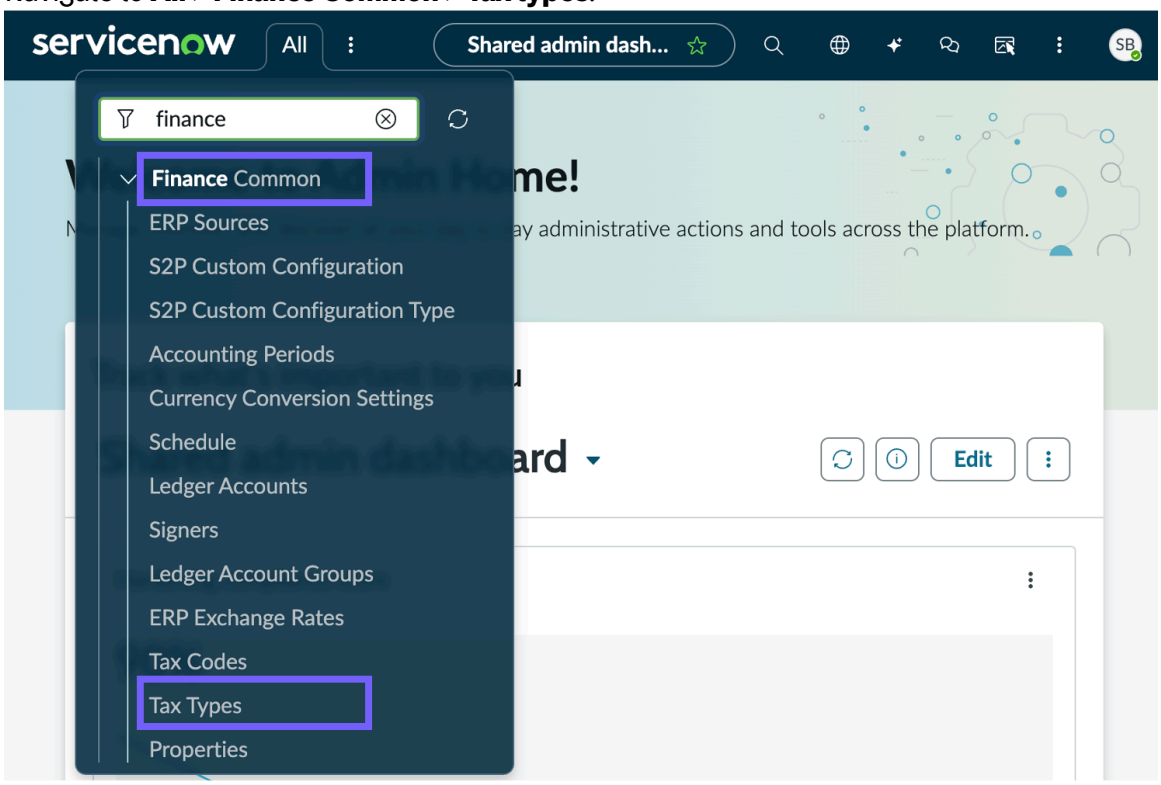
Create tax types to be used in an invoice

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. Select **New** on the tax type page.

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3. On the form, fill in the fields.

Tax type 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	State to make the tax type available.

4. Select **Save**.

Result
The tax type details are added.

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.

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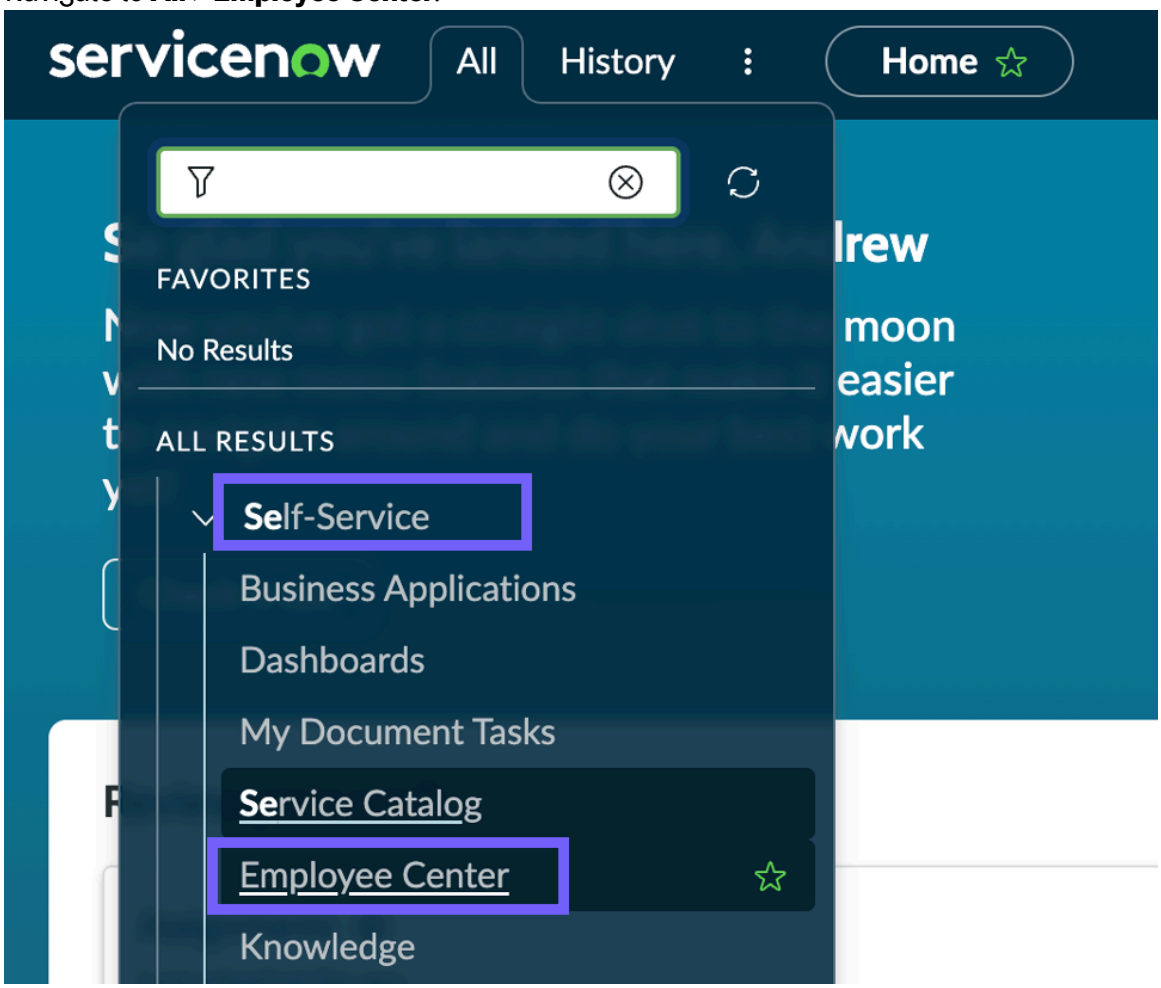
View your invoices on Employee Center

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.

Result
The business owner views all owned invoices on Employee Center.

Related topics

- Accounts Payable Invoice Processing
- Invoice Case Management
- Source-to-Pay Workspace
- Invoice processing cases
- Invoice approvals

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Invoice processing cases

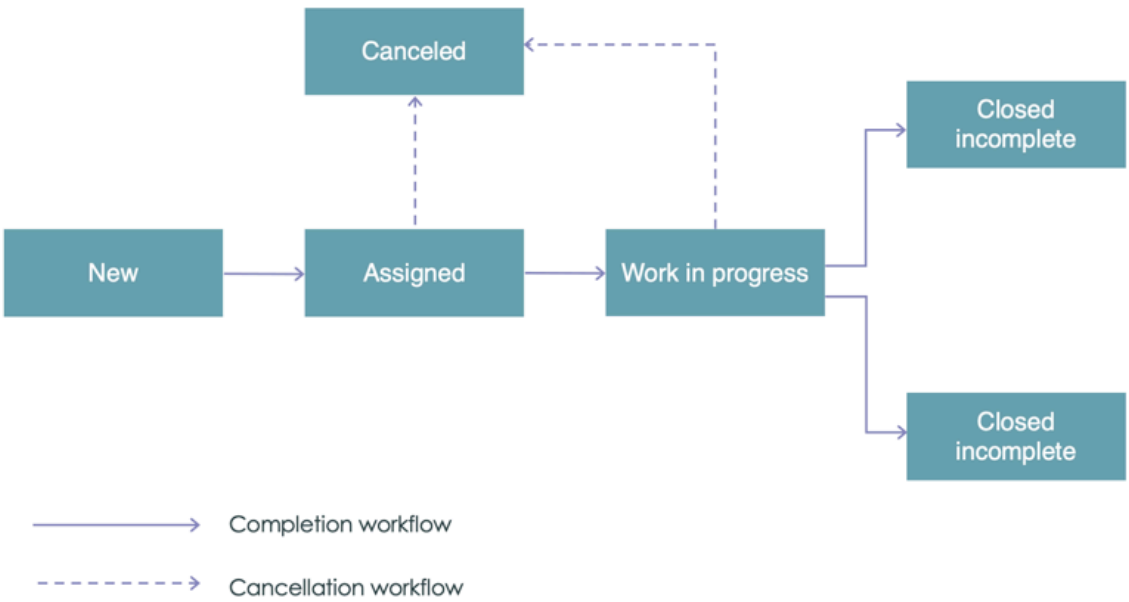
Typically, Accounts Payable Operations integration with Document Intelligence automatically creates the invoice processing case by extracting data from the invoice that you receive as an attachment via email. However, the Accounts Payable Specialist may need to manually create a new invoice or update details of a partially created invoice in situations where the automated invoice creation process encounters issues or is not available.

By default, when an inbound email is received in Accounts Payable Operations integration with Document Intelligence, the invoice processing flow is triggered and an invoice case with a category of **Invoice automation** and sub-category of **Invoice processing** is created. For more information, see Install Accounts Payable Operations integration with Document Intelligence.

Invoice processing case life cycle

The following figure illustrates the various states that the Invoice processing case goes through during its life cycle, from its creation to closure.

Manual invoice ingestion case life cycle



Invoice processing case states

State	Description
New	The case is created.
Assigned	The case is assigned.
Work in progress	The case is being worked on.
Closed complete	The case moves to this state after the invoice approval request is approved by the approver or after the invoice is auto-approved by the approval engine.
Closed incomplete	The case moves to this state when the invoice is in the Suspected duplicate state and the Accounts Payable Specialist selects the **Confirm duplicate** option.
Canceled	The case is canceled because it was created in error or is no longer required.

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Work on an invoice processing case

Perform different manual actions to process an invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

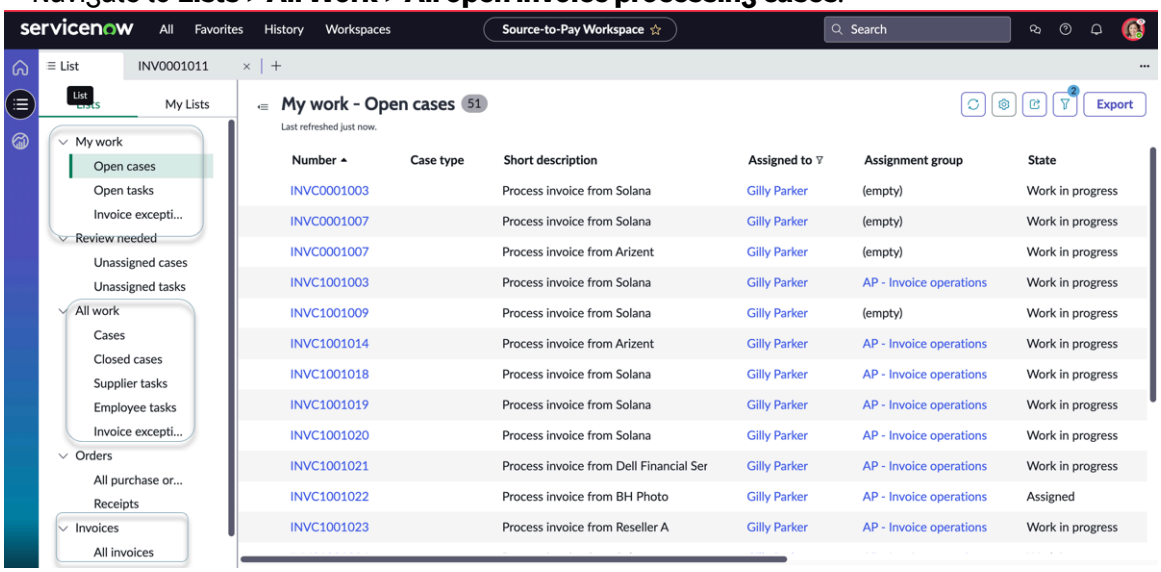
An invoice case with a category of Invoice automation and sub-category of Invoice processing is referred to as an invoice processing case.

By default, an invoice processing case is automatically created when you receive an invoice via email. Document Intelligence captures the invoice data and subsequently creates the invoice and invoice line records in Accounts Payable Operations. However, the Accounts Payable Specialist can also manually create an invoice from the 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 **Source-to-Pay Workspace>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.

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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:

Tasks in invoice processing case

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 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, see Confirm whether an invoice is a duplicate.

   If you confirm that the invoice is a duplicate, the invoice moves to the Confirmed duplicate status and the invoice processing case moves to the Closed incomplete state.

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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.

  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.

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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.

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

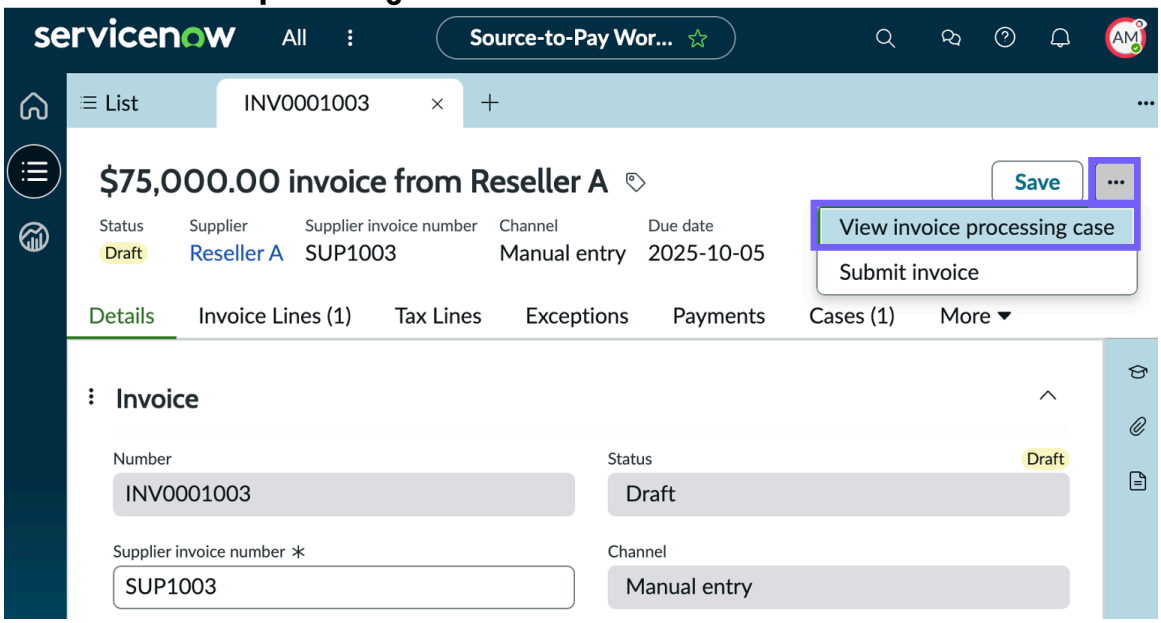
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

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.

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5. Select **View invoice processing case**.



Result
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.

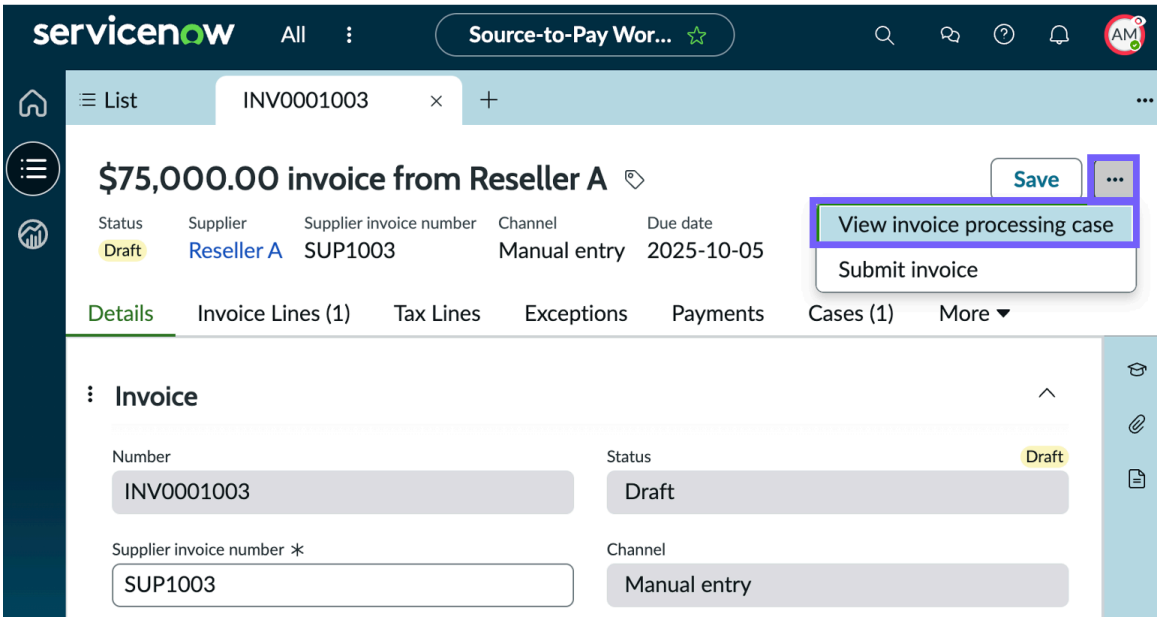
Before you begin
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

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**.

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The invoice processing case opens and displays the following notification at the top:

```
Invoice has a data extraction error. Review invoice with
automation to continue processing.
```

6. Select **Review invoice**.
7. Refer to the invoice document and fill in the fields for the invoice.
8. Select **Submit**.
   The invoice and invoice line records are created and the invoice is associated with this invoice processing case.
9. Open the invoice processing case and select **Submit invoice**.
   A message appears asking you for a confirmation.
10. Select **Yes**.
    The invoice is submitted for further processing and the status of the invoice changes to Received.

Enter the missing required invoice information and submit an invoice

If Document Intelligence encounters a transformation error, the invoice is created and associated with an invoice processing case. However, not all required information is populated on the invoice. You must manually enter the required information and submit the invoice for further processing.

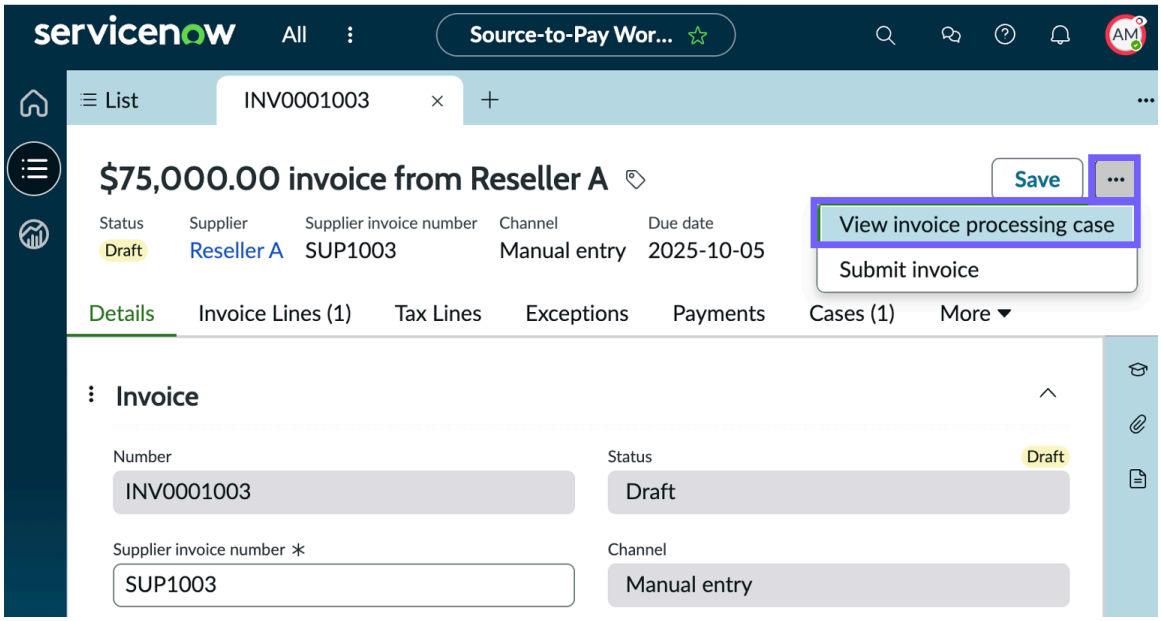
Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Primary Data** > **Invoices**.
4. Open an invoice in the Draft status.
5. Select **View invoice processing case**.

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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.
```

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:

Duplicate invoice exception options

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

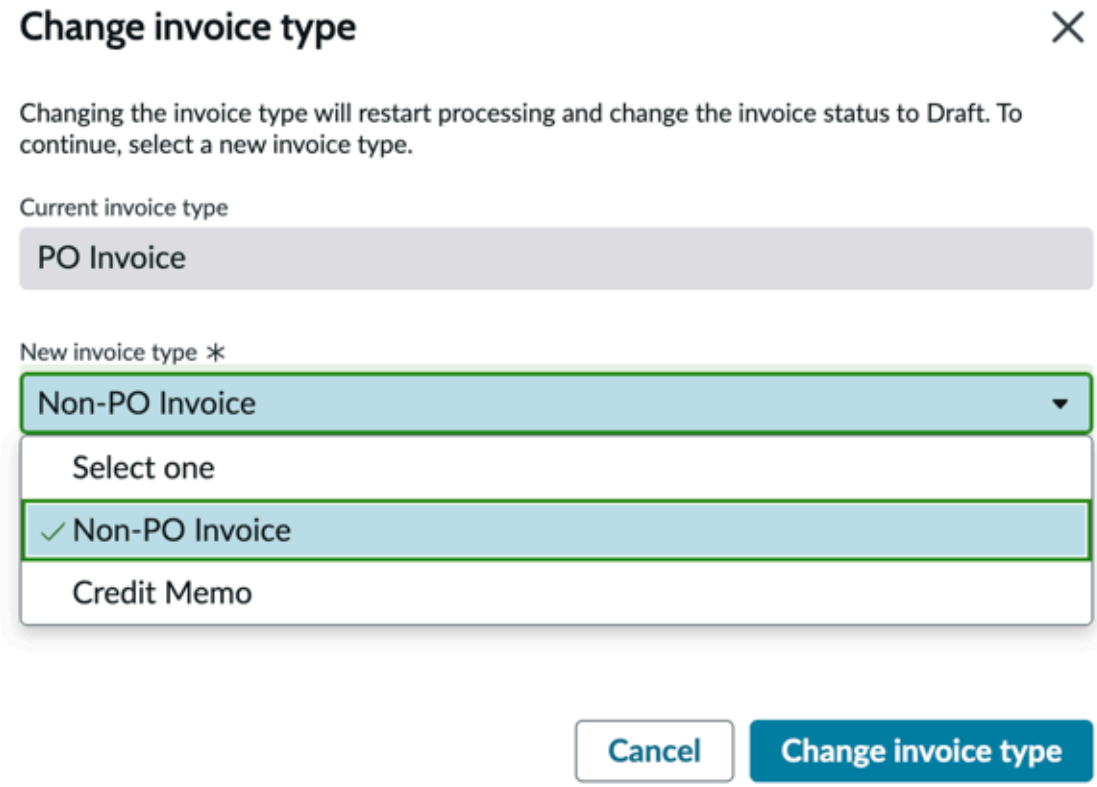
1. Navigate to **All** > **Source-to-Pay Workspace** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **My work** > **My open invoice processing cases** and open an invoice processing case.
   An alternate way is by navigating to **Lists** > **Primary Data** > **>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. Select **View invoice processing case**.
5. Select **More Actions**  **>Change invoice type**.

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You can choose to convert invoice types



to:

- PO to Non-PO invoice and vice versa
- Credit memo invoice to PO invoice, Non-PO invoice and vice versa

A message appears asking for your confirmation.

6. Select **Change invoice type**.
7. Select **Save**.
   The status of the invoice changes to **Draft**. The invoice is reprocessed and re-validated.

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.

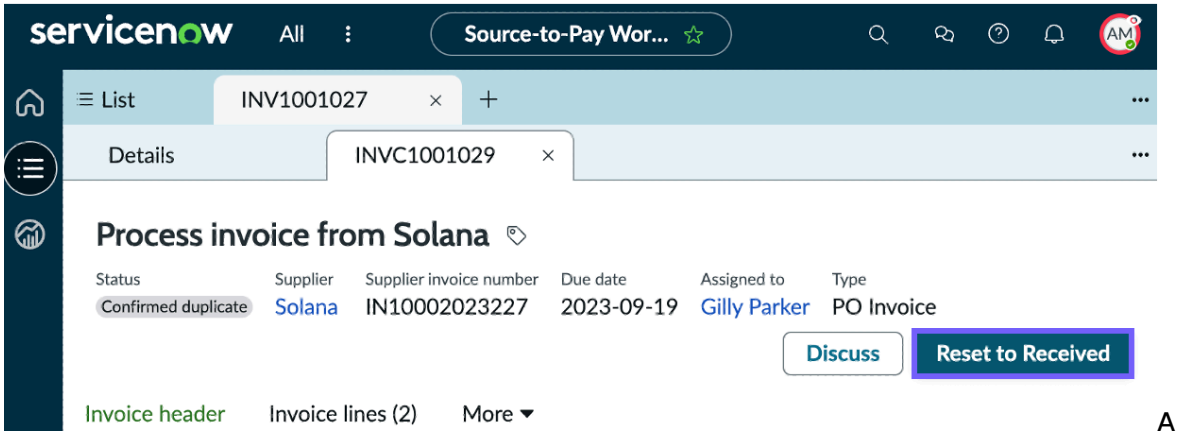
Before you begin

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**.

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A message appears asking you for a confirmation.

7. Select **Yes**.
   The status of the invoice changes to Received.

Check for invoice exceptions on a single invoice

Manually check for invoice exceptions on a single invoice so that you can resolve them.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

The **Check exceptions** option is available for all invoices that are in **Exceptions found** state.

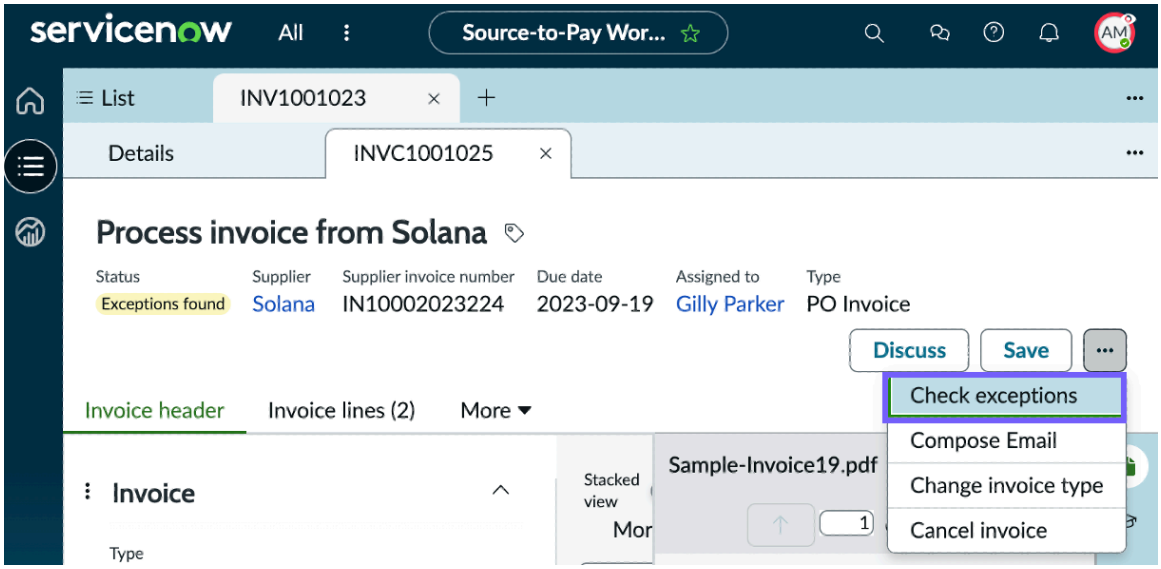
Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Primary Data** > **Invoices**.
4. Open an invoice that is in the **Exceptions found** state.
5. Select **View invoice processing case**.

> **Note:** If you open an invoice processing case for an invoice that is in Exceptions found status, the invoice processing case form displays the following notification at the top:
>
> ```
> Invoice has one or more exceptions. Resolve all issues in
> "Invoice exceptions" to continue processing.
> ```

6. On the invoice processing case form, select **Check exceptions**.

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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.

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists** > **Primary Data** > **Invoices**.
4. Open the invoice that is imported into Accounts Payable Operations via integration.
5. Select **Start invoice processing**.
   An invoice processing detailed record and an invoice processing case is created for the invoice and the invoice processing begins.

   After an invoice processing case is created for the invoice, the **Start invoice processing** option is replaced by the **View invoice processing case** option on the Invoice form.

   The invoice is processed based on its current status. For example, if the invoice is in the Received status, the duplicate check process is run, if the invoice is in the PO matching completed status, the exception engine is run, if the invoice is in the No exceptions found status, the approval engine is run, and so on.

   The invoices for which an invoice processing case is not created automatically, a scheduled job runs at regular intervals to pick up such invoices, creates an invoice case for each invoice, and starts the processing for the invoices. The scheduled job enables you to start the processing for all such invoices in bulk, without requiring you to start the processing for each invoice individually.

Activate the Start Invoice Processing for Orphan Invoices flow

Activate the **Start Invoice Processing for Orphan Invoices** flow to start the processing of an invoice that doesn't have an associated invoice case.

Before you begin
Role required: admin

About this task
This flow creates an invoice processing case, associates the invoice with that case, and then starts the invoice processing.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and select the **Start Invoice Processing for Orphan Invoices** flow to open it.
3. Select the more actions icon () in the top right and select **Copy flow**.
   The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations**.
6. Select **Copy**.
   A copy of the flow opens.
7. Under TRIGGER, specify the conditions that trigger this flow.
8. Select **Save**.
9. Select **Activate**.

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Case exclusion rules

Case exclusion rules let an AP admin define conditions that stop Invoice Case Management from creating a case from an inbound email. Use exclusion rules to filter out emails that don't need agent attention, so that AP agents focus on genuine invoice inquiries.

Key benefits

Case exclusion rules provide the following benefits:

- Reduce email traffic and redundant work by preventing cases for emails that don't require agent action.
- Keep AP agents focused on the real, necessary invoice inquiry cases.

How it works

The following points describe how case exclusion rules work:

- An AP admin defines each rule with a condition builder that evaluates inbound email fields: **Subject**, **Recipients**, **User**, **User ID**, and **Body Text**.
- When an inbound email matches any active rule, the exclusion engine ignores the email and does not create a case.
- Exclusion rules apply only to invoice inquiry cases. They don't affect processing cases.

Create case exclusion rules

Create a case exclusion rule to stop Invoice Case Management from opening a case when an inbound email matches conditions that you define. You can also modify or delete existing rules to keep your email filtering current.

Before you begin

Role required: `sn_ap_cm.admin`

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Invoice case exclusion rules**.
2. Select **New**.
3. Complete the exclusion rule fields.

   The **Rule ID** is generated automatically and **Rule Applies To** is set to **Invoice Inquiry Case**. For the full field list, see Case exclusion reference fields.
4. In the condition builder, define the conditions that identify the emails to ignore.

   You can build conditions on the following inbound email fields:**Body text**, **Keywords**, **Recipients**, **Subject**, **User**, and **User ID**.
5. Select **Submit**.

Result

The rule is saved and the exclusion engine applies on the inbound emails immediately. Inbound emails that match the rule no longer create a case, while all other emails continue to create cases as usual.

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What to do next

To change how an email category is filtered, open the rule and update its conditions, then submit the change. To stop filtering an email category, delete the rule. Modifications and deletions also take effect immediately.

Invoice ingestion process when Document Intelligence is unavailable

When Document Intelligence goes down or when Document Intelligence itself is not installed, and if you receive an invoice document via email, an invoice processing case is created but an invoice record is not created.

In this scenario, the invoice processing case displays the **Create invoice** and **Close case** options. The Accounts Payable Specialist must open the invoice processing case and either create the invoice or close the invoice processing case.

Create an invoice manually when Document Intelligence is unavailable

As an Account Payable Specialist, manually create an invoice if an invoice processing case automatically is created when the Document Intelligence application is unavailable.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:
   - Navigate to **Lists** > **My Work** > **My open invoice processing cases**.
   - Navigate to **Lists** > **All Work** > **All open invoice processing cases**.
4. Open the invoice processing case.
5. Select **Create invoice**.
   The invoice is created and the invoice processing case displays the following message:

   ```
   Invoice has been successfully created. Verify all the required
   fields are correct and add invoice lines before submitting.
   ```

   Verify that the values in the invoice fields are correct and ensure that you add at least one invoice line for the invoice. For more information, see Create an invoice line manually.
6. Select **Submit invoice**.

Close the additional invoice processing case for an invoice

Close the auto-created invoice processing case if one already exists for an invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist

About this task

If you create an invoice manually, a new invoice processing case is created for that invoice. As a result, the auto-generated invoice processing case becomes redundant and therefore you can close it.

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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 processing cases**.
   - Navigate to **Lists** > **All Work** > **All open invoice processing cases**.
4. Open the invoice processing case.
5. Select **Close case**.
   The Close case dialog box is displayed.
6. From the Closure code list, select one of the following options:
   - **Duplicate invoice**
   - **Invoice canceled**
   - **Invoice approved**
7. In the **Reason** field, enter the reason why you're closing the case.
8. Select **Close case**.
   The invoice processing case is closed and its state updates to Closed complete.

Invoice exceptions

Invoice exceptions are issues that are identified in an invoice during invoice processing.

The Accounts Payable Operations exception engine automatically identifies discrepancies in invoices and lists them as invoice exceptions in the 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.		To resolve this invoice exception, do the following: • If the supplier information is missing on the invoice, do the following:	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
	• 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 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		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 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,	

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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 header-level exception.		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 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	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			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. 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.	PO invoice
Insufficient Goods Receipt	This exception occurs when one or more lines of		**Resolving the Insufficient**	PO invoice

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
	an invoice don't have sufficient receipts to process the invoice. This exception is a line-level exception.		**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	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			exception form. The receipt task is assigned to the user specified in the **Recipient** field on the PO line. The recipient must have the sn_shop.acknowledgement_task_owner role to complete the receipt task from Employee Center. For more information, see Confirm receipt of your order from Employee Center. **Resolving the Insufficient**	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			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 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	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			task as complete from Employee Center.	
Valid coding required	This exception occurs when one or more lines of an invoice cost is distributed across multiple cost centers or general ledger accounts. When the cost is split across multiple cost centers, the cost center field on the invoice line is read-only and allows one type of allocation type in the cost. This exception is a line-level exception and applies for general ledger account.		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, enter the information for invoice lines or cost allocations. For example: You can enter a ledger account in the invoice lines and add multiple cost allocations on the allocations page, or you can enter a cost center in the invoice lines and include several general ledger account allocations on the cost allocations page. You can also choose to enter general	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
			ledger and cost center both in the invoice line.	
Missing required information	This exception occurs when one or more fields of the following are missing on the invoice: • Payment terms • Invoice type • Supplier • Invoice amount • Invoice date • Legal entity 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.** Populate the following fields on the invoice: ○ Payment terms ○ Invoice type ○ Supplier ○ Invoice amount ○ Invoice date ○ Legal entity	PO Invoice and Non-PO invoice
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

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
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. **3.** You can choose to either accept system tax or supplier tax.	PO Invoice, Non-PO invoice, and Credit memo
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	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
			either accept system tax or supplier tax.	
Tax validation failed	This exception occurs when the tax is not validated due to integration error		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) or Tax specialist role. **2.** The system restarts the tax execution	
Tax validation expired	Tax information is changed after the invoice execution, then Tax validation expired failed exception is raised.		**1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) or Tax specialist role. **2.** Make necessary corrections to the invoice and selects **Validate tax** to re-calculate the tax	
Under tax amount variance (Invoice line)	Tax amount on an invoice line is lesser than the tax response received for the line item through tax engine		**1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist)	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			or Tax specialist role. 2. Make necessary corrections to the invoice line item and select either **Accept Supplier tax** or **Accept System tax**	
Under tax amount variance (Invoice header)	Total tax amount on the invoice header is lesser than the total tax for the invoice received through tax engine		1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) or Tax specialist role. 2. Make necessary corrections to the invoice header and select either **Accept Supplier tax** or **Accept System tax**	
Over tax amount variance (Invoice header)	Total tax amount on the invoice header is greater than the total tax of the invoice received through tax engine		1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) or Tax specialist role. 2. Make necessary corrections to the invoice header and select either	

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			Accept Supplier tax or **Accept System tax**	
Over tax amount variance (Invoice line)	Tax amount on the invoice line is greater than the tax of the invoice line item of the invoice received through tax engine		1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) or Tax specialist role. 2. Make necessary corrections to the invoice line item and select either **Accept Supplier tax** or **Accept System tax**	
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

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
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: **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.	PO invoice
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

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
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 invoice, and purchase order fields.	Credit memo
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	Credit memo

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Invoice exception type (continued)

Invoice exception	Description		Do these steps to resolve the invoice exception	Applicable to
			(approved or pending approval) related to the PO line.	
Missing tax information	This exception occurs when tax line information is missing in an invoice. This 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.** Add tax lines details to the invoice using the **Add tax** button. **Note:** The under tax amount variance and over tax amount variance are dependent on the Missing tax information exception.	PO Invoice, Non-PO invoice, and Credit memo
Missing tax code details	This exception occurs when tax code details are missing in one or more invoice lines. This exception applies to PO invoice,		To resolve this invoice exception, do the following: **1.** Log in to the application with the	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
	non-PO invoice and credit memo. This is a line level exception.		Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Populate the tax code details.	
Currency mismatch	This exception occurs when the currency on an invoice does not match the currency on the associated purchase order when purchase order mapping is disabled and the invoice is still in draft state. The cost allocation data is preserved even when the purchase order mapping is turned off.		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. Correct the currency details to match the invoice and purchase order.	PO invoice, Credit memo

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.

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**.

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In the workspace, select the list icon ( ) and do one of the following:

- Navigate to **Lists** > **My Work** > **My open invoice exceptions**.
- Navigate to **Lists** > **All Work** > **All open invoice exceptions**.

The Accounts Payable Specialist can analyze the invoice exceptions, create exception tasks, and assign these tasks to the relevant individuals to fix the exceptions and resolve the case. For more information, see Work on an invoice exception.

Activate the Exceptions Monitoring Scheduler

Activate the **Exception Monitoring Scheduler** to run the exception engine on a regular schedule to identify invoice exceptions.

Before you begin
Role required: admin

About this task
The default automatically runs every 5 minutes after you activate it.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the **Exception Monitoring Scheduler** to open it.
3. Select **Active** check box.
   You will notice the**Repeat interval** set to five minutes.
4. Select **Update**.

Work on an invoice exception

As an Accounts Payable Specialist, analyze the invoice exceptions, create exception tasks, and assign them to the relevant individuals to resolve the invoice exceptions.

Before you begin
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task
For a description of the field values and information about the available tabs on the invoice exception form, see Invoice exception form. For details about the available tabs for an exception task, see Invoice task form tabs.

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

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View exception options

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**.

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

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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:

Create exception options

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**. 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.

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To	Do this
	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.
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.

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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.

Before you begin
Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

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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:

View exceptions

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.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

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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 **Source-to-Workspace** > **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.

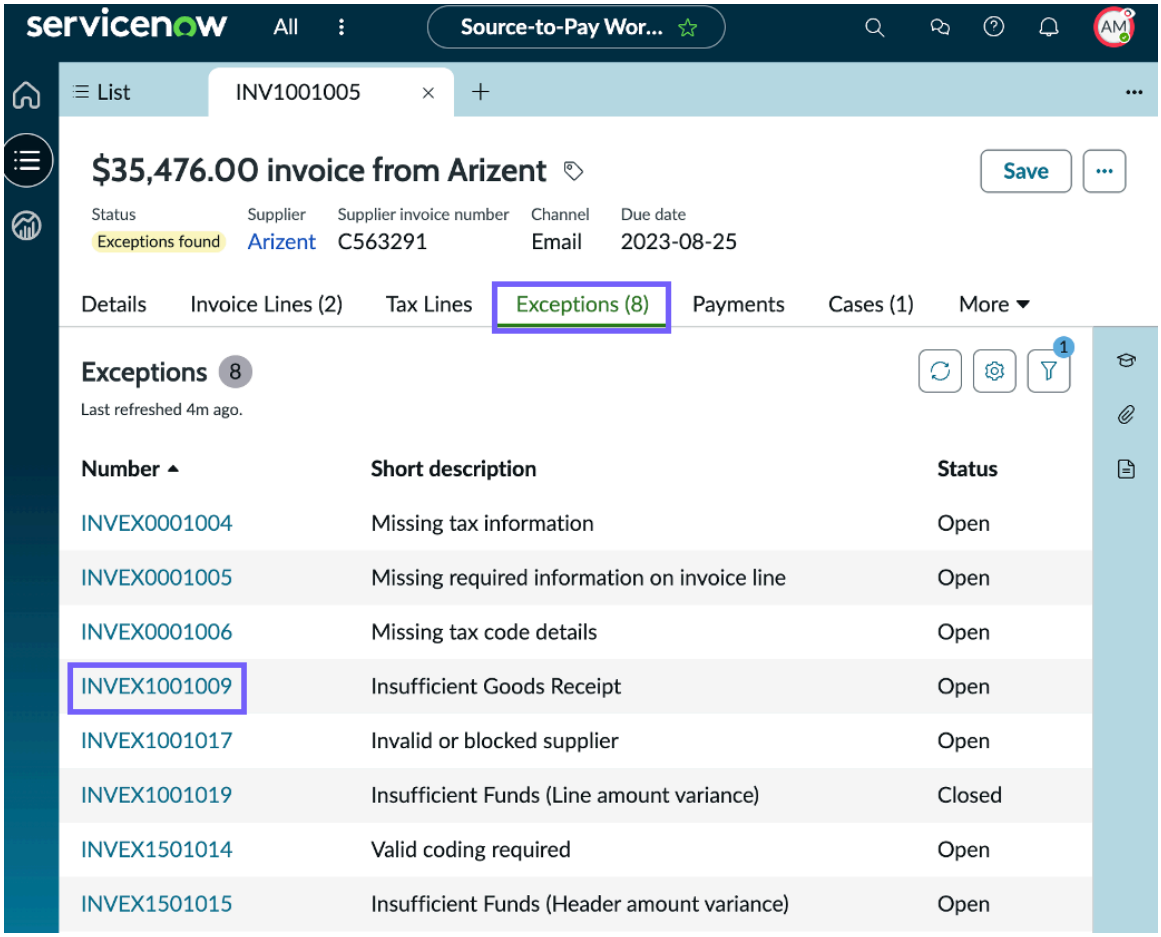
Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All** > **Source-to-Pay workspace** > **Accounts Payable Operations**.
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.

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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.

Result
The Accounts Payable Specialist understands the Insufficient Goods Receipt exception by viewing Sourcing and Procurement tasks.

Create an invoice exception definition

You can create invoice exception definition for invoices of types PO, Non-PO, credit memo.

https://player.vimeo.com/video/983170290?h=5c81ae0349&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: sn_ap_apm.admin

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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 > **Save**.
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 the invoice record with all fields configured and click **View invoice processing case**.
    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.
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.

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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**.

k. Select **then** >  icon.

l. Click **Done**.

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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

Tolerance rules define the limits set on an invoice to determine the permissible amount of variance that can be applied to an invoice before the invoice total exceeds the tolerance limit.

The exception engine checks whether invoices with exceptions are configured with tolerance rules. You can customize tolerance rules of different types where the variance is compared with defined tolerance percentage and tolerance values. If the tolerance value exceeds the tolerance limit, exceptions are raised.

Tolerance types

Accounts Payable Operations supports the following tolerance types:

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- Line amount tolerance: Avoid payment delays by defining the acceptable difference between the expected and actual total amount for specific items or services of invoice. If the actual amount exceeds the expected amount but falls within this limit, the invoice is considered valid for payment.
- 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. If the actual quantity exceeds the purchased quantity but remains within this limit, the invoice is considered valid for payment. This is a line level tolerance.
- Line unit price tolerance: Prevent 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. When the actual unit price falls within this specified range, the invoice is ready to be processed for payment. This is a line level tolerance.
- Overbilling amount tolerance: Defines the maximum allowable amount of overbilling between an invoice and the corresponding purchase order. If the actual amount exceeds the expected amount but falls within this limit, the invoice is considered valid for payment. This is a header level tolerance.
- Over tax amount and under tax amount variances: Ensure smooth payment processing by defining an acceptable range between the supplier-provided tax and system-calculated tax amounts that allows minor differences within the defined tolerance range. If the supplier-calculated tax exceeds the system-provided tax but remains within the Over tax tolerance limit or the system-calculated tax exceeds the supplier-provided tax but remains within the Under tax tolerance limit, the invoice is considered valid for payment.

> **Note:** If tax amount variance for a tax line is within the tolerance range, then supplier tax amount will be copied over to final tax amount field by default.

Define an invoice tolerance type

Define an invoice tolerance type that you can use in an exception definition.

Before you begin

Role required: sn_ap_apm.invoice_tolerance_admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **All** > **Tolerance types**.
2. On the **Invoice Tolerance type** list, select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Name of the tolerance type
Application	The application value is automatically set to Accounts Payable Invoice Processing.
Line level	Option to make the tolerance type applicable at the line level.
Description	Brief description of the tolerance type

4. Select **Submit**.

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Map invoice tolerance type with invoice exception definition

Define a new tolerance type and map them with invoice exception definition of your choice to fulfill a goal.

Before you begin

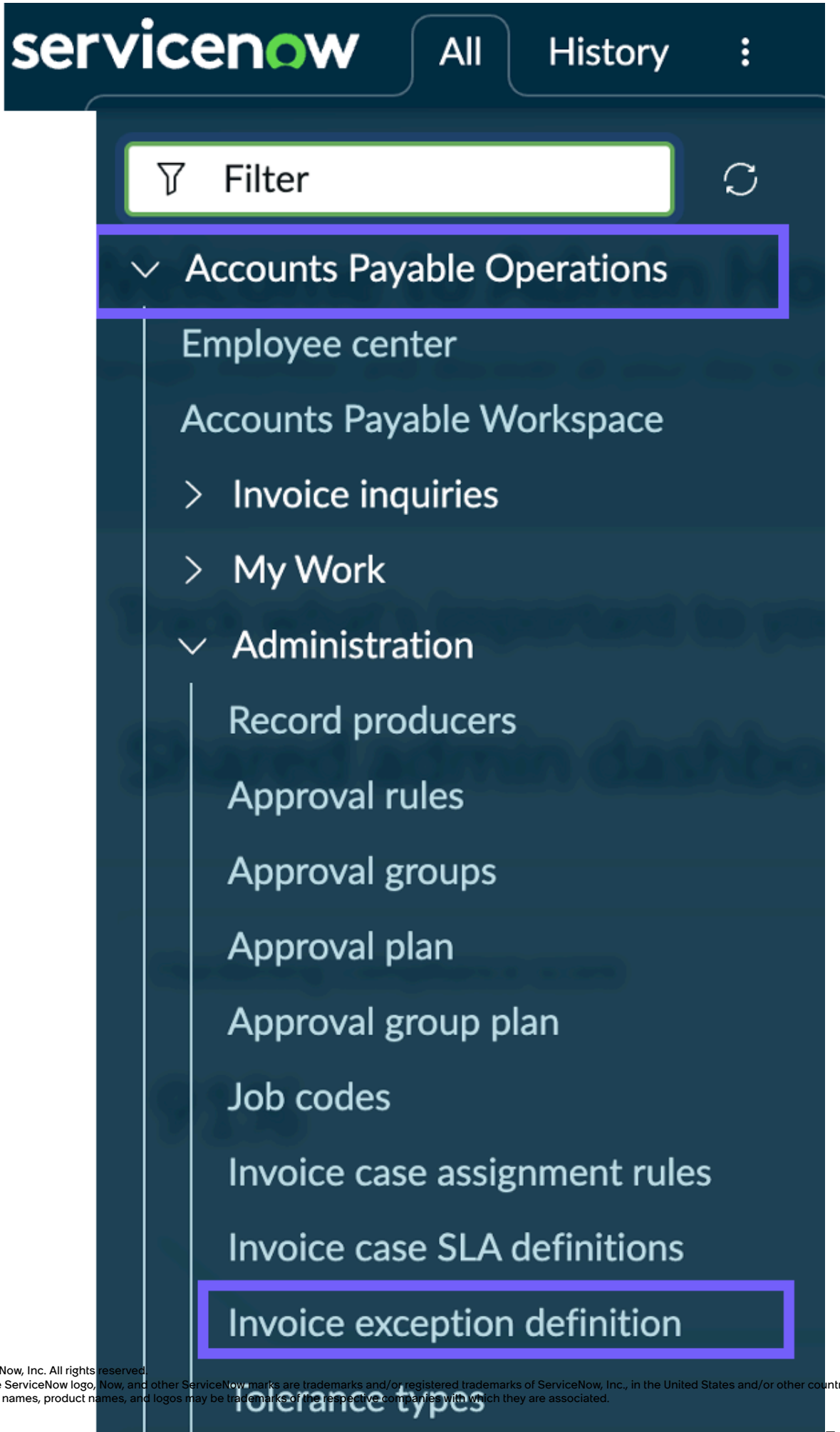
Role required: sn_ap_apm.admin

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Invoice exception definition**.

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2. Populate the tolerance type on the invoice exception definition form.
   For more information on the tolerance type, see Define an invoice tolerance type.
3. You must update the **Subflow** logic to include associated tolerance type logic as per the business requirement.
4. Select **Submit**.

Define an invoice tolerance rule

Configure 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

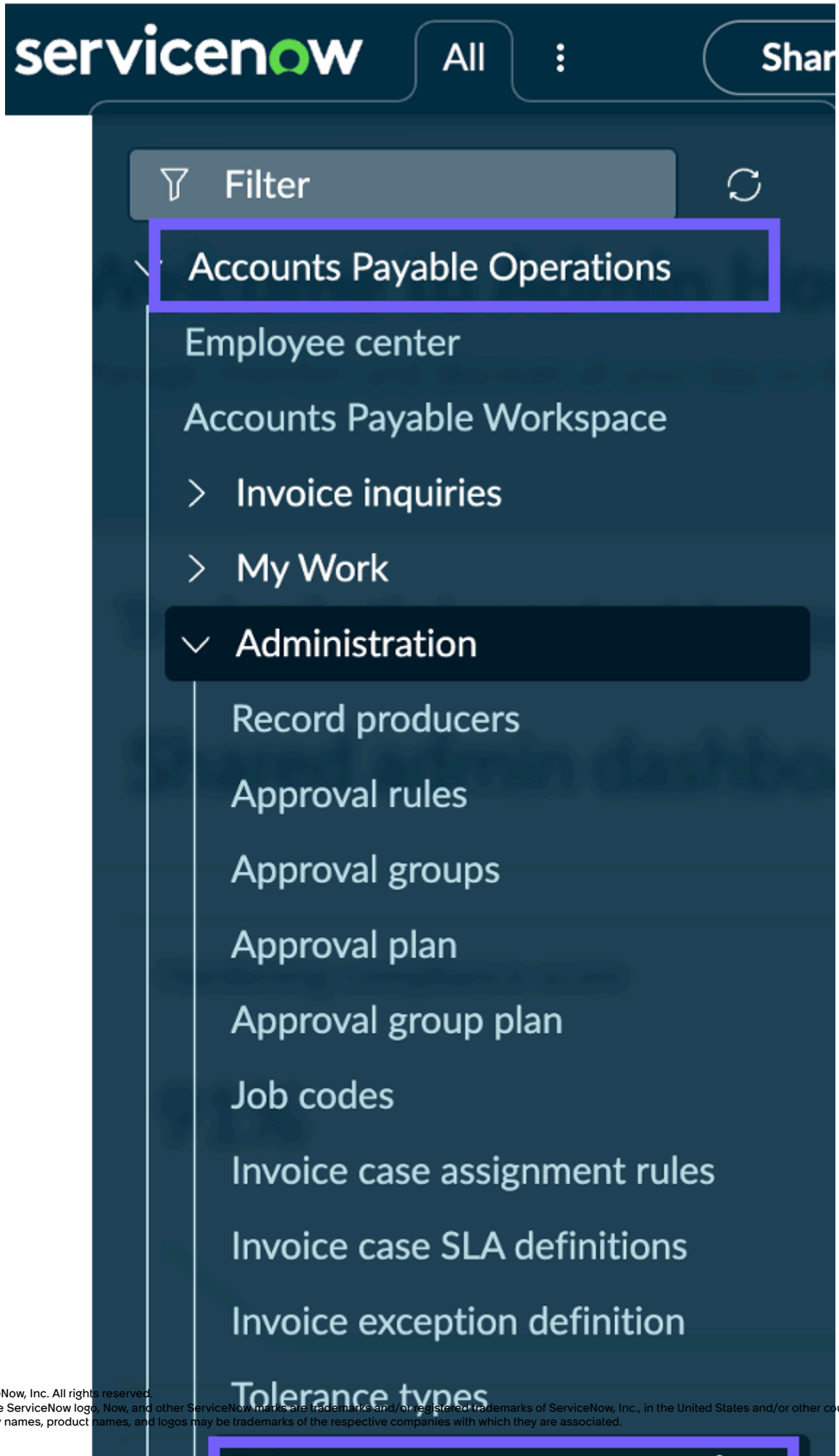
Enable sn_ap_apm.reader role to access invoice filters for tolerance rules.

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **All** > **Tolerance rules**.

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2. On the **Invoice Tolerance rule** list, select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Name of the tolerance rule.
Active	Option to make the tolerance rule available for invoice processing.
Type	The tolerance type to associate with the toler ance rule.
Order	Defines the priority in which you would like to process the tolerance rule. The lowest order is applied on the invoice. Example: If there are two rules applicable with the orders set as 10 and 20. Rule with order 10 is applied on the invoice.
Tolerance value	Set the permissible variance limit of type nu meric 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 need to be met to skip an exception. ○ **AND** - If both the **Tolerance value** and **Tol erance percentage** values should be met. ○ **OR**-lif either the **Tolerance value** or **Toler ance percentage** values should be met.
Invoice filters	Filter condition to determine the invoices for which the tolerance rule is applicable. For ex ample: **[Type][is][PO invoice] AND [Suppli er]]is][X]**. You can concatenate additional fil ters by using **New Criteria**.

4. Select **Submit**.

View tolerance form

Invoice processing cases with exceptions displays the associated **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**.
   List of **All open invoice processing cases** is displayed.
2. Open an invoice case.
3. Click **Exceptions**.

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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 is exceeding the limit, the values are highlighted in yellow color with warning ⚠ icon suffixed with **Exceeds** and **Within** labels. Grey color indicates that the variance value and variance percentage is within the limits or closed with 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.

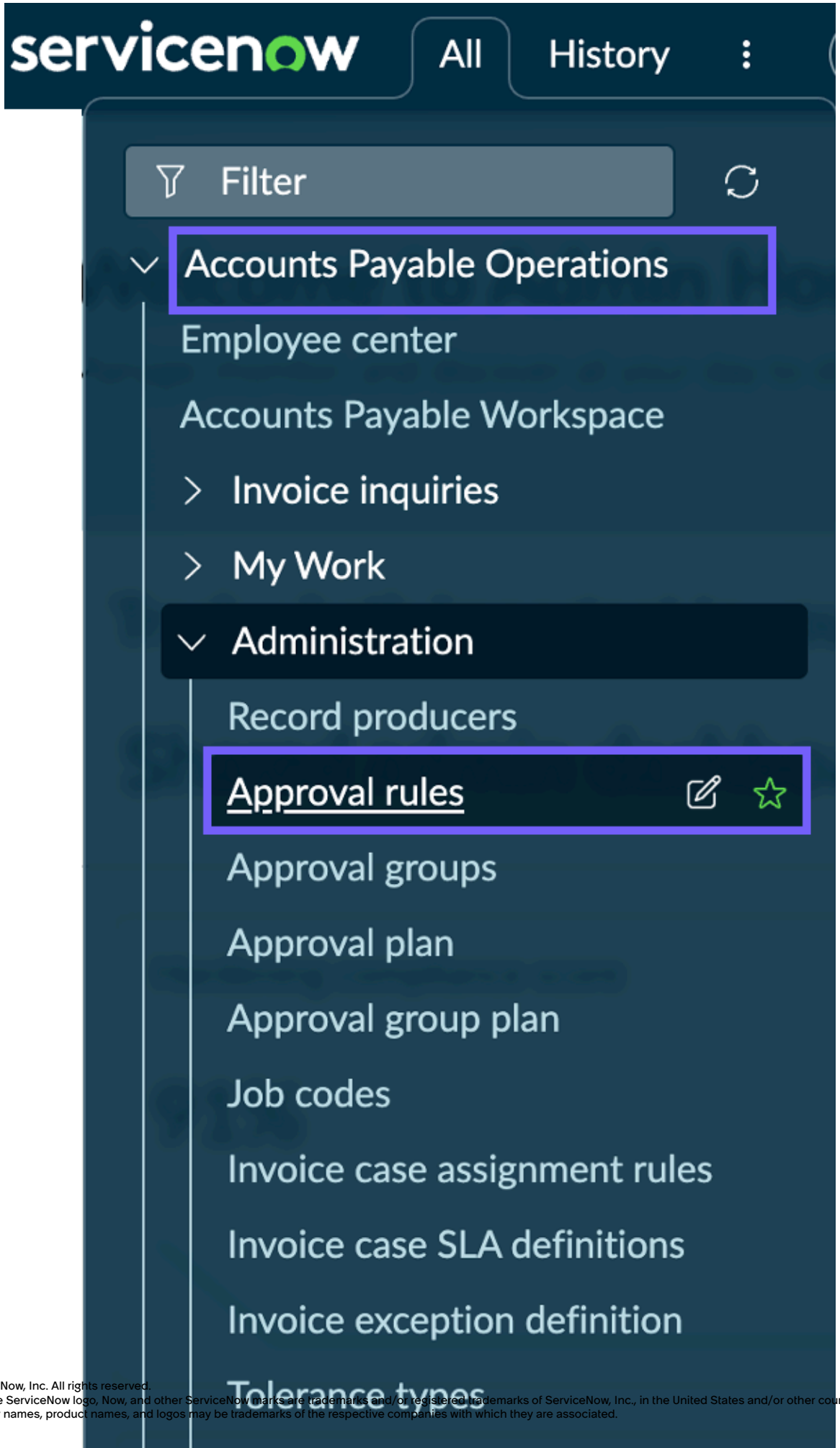
Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Approval rules**.

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2. Select **New**.
3. On the Approval Rule form, fill in the fields.
   For a description of the field values, see Approval Rule form.
4. Select **Submit**.

What to do next

You can also associate approval rules with approval groups and define the sequence to determine when these rules should be triggered. For more information, see Approval rule grouping and sequencing.

Approval rule types

Approval rule types determine how approvals are created and routed during the invoice approval process.

The approval rule types determine the conditions under which approval plans are created and routed.

Approval rule types

Approval rule type	Description
Dynamic Users or Groups	Approvals are dynamically created and sent to the specified user or group. Approvals are triggered based on the purchasing user's attributes. The approval routing method is restricted to just sending approvals in parallel.
Managerial Job Code Hierarchy	Approvals are triggered based on the purchasing user's job code and manager's job code. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver.
Managerial Hierarchy	Approvals are triggered based on the purchasing user's manager's hierarchy. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver.
Specified Users or Groups	Approvals are triggered based on the specified users or groups. The approval routing method is restricted to just sending approvals in parallel.

Monitor an approval plan

Monitor approval plans to understand how the overall approval process is progressing.

Before you begin

To monitor an approval plan, you must have already defined an approval rule. For more information on how to create approval rules, see Create an approval rule. You can review and update the plans if required. Approval plans are not created manually.

Role required: admin

About this task

The approval engine converts each approval rule into one or multiple approval plans. You can monitor approval plans to understand how the overall approval process is progressing, the routing and decision methods used, the list of approvers involved, the status of the approvals, the list of invoice lines the approval is planned for, and so on.

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Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Approval plan**.
2. Select a record.
3. On the Approval Plan form, review the fields.
   For a description of the field values, see Approval Plan form.

What to do next

Use the related lists of the Approval Plan form to view the approval plan details and approvers associated with this approval plan.

Approve an invoice approval task from Employee Center

Review the invoice approval tasks that are assigned to you and approve or reject them.

Before you begin

Role required: sn_shop.invoice_owner

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. On the **Open** tab, select an invoice approval task.
3. Do one of the following:

Invoice approval options

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 **All** > **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Select the list icon ( ).
3. Navigate to the list of invoice cases.

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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 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.

Note: Check your entitlements to determine whether you have access to Advanced Work Assignment in Accounts Payable Operations in Source-to-Pay Operations Professional.

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.

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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

   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.

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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.

Configure Agent chat for Accounts Payable Operations

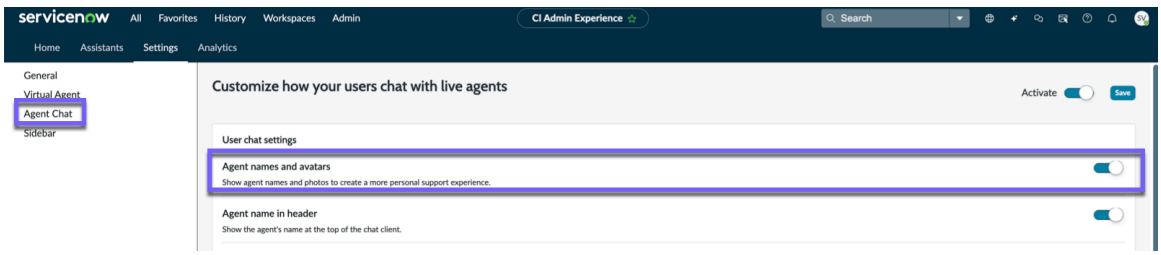
Configure agent chat settings to interact with an Accounts Payable Operations agent.

Before you begin

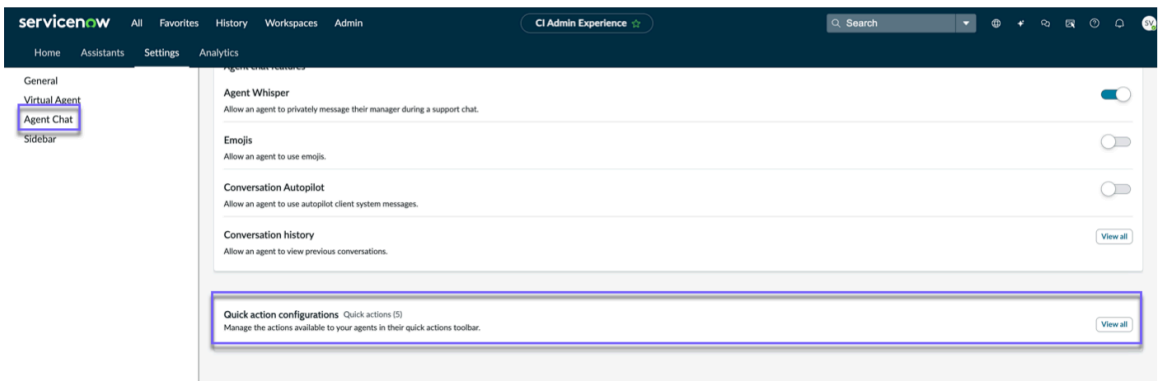
Role required: admin

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.



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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**.

Result
The agent chat settings are configured to interact with an Accounts Payable Operations agent.

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

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:

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Interaction record details

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 a new interaction.

.

Create a 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.
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.

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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 ()List icon and select **Interactions** >**All**.
3. View interactions in the desired category to associate a record with an invoice case.

- 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

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Field	Description
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 ( ) from an invoice case. A draft email appears with pre-populated data in the **To** and **Subject** fields.

The **To** field is auto-populated with the following information:

- The email address of the user in the **Requested by** field on the invoice case form.
- The email address of the user in the **Assigned to** field on the invoice case form.

The **Subject** field is auto-populated with the case number and the invoice case short description.

Using quick messages

In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Messages contextual pane appears in the email client so that you can draft an email with a quick message of your choice.

For more information on how to create a quick message, see Define a quick message.

Using response templates

Resolve cases faster and more efficiently with response templates. Response templates are reusable messages that can be copied to draft emails to provide quick and consistent messages to users.

Open the response template that you want to use for your email and select **Copy to clipboard**. You can now paste the contents of this template at the location of the cursor. It doesn't replace the content that you created before selecting the response template. To replace existing content with a response template content, highlight the text to replace and then select a response template.

For more information on how to work with response templates, see Create or modify a response template.

Communicate using emails from the 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.

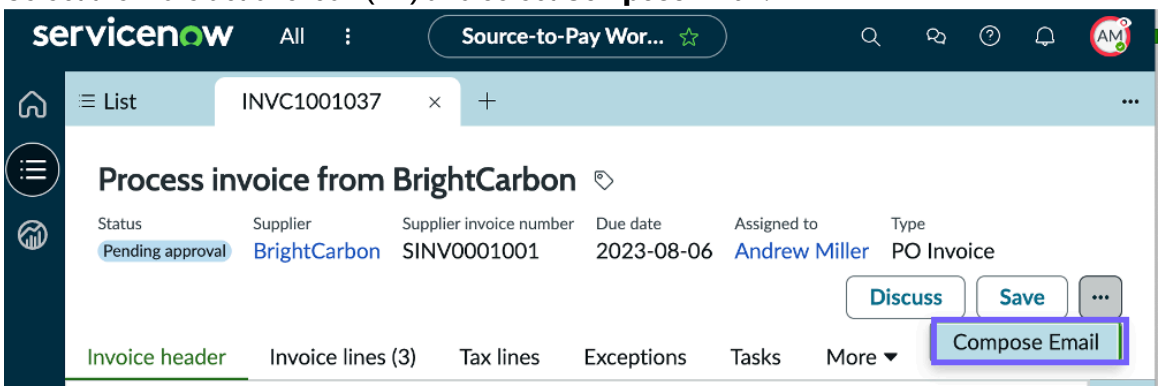
Before you begin

Role required: sn_ap_apm.accounts_payable_specialist, sn_ap_apm.admin, sn_ap_cm.agent, or sn_ap_cm.admin

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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:
   - 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**.

Universal Request in Accounts Payable Operations

The ServiceNow Universal Request (UR) feature transforms fragmented service intake into a centralized, intelligent, and scalable experience for invoice case management.

The Universal Request (UR) is a key ServiceNow capability that serves as a centralized entry point for both invoice owners and suppliers. The primary purpose of UR is to simplify the process

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of raising general case requests, thereby removing any uncertainty regarding the appropriate department to contact for assistance.

Persona based roles

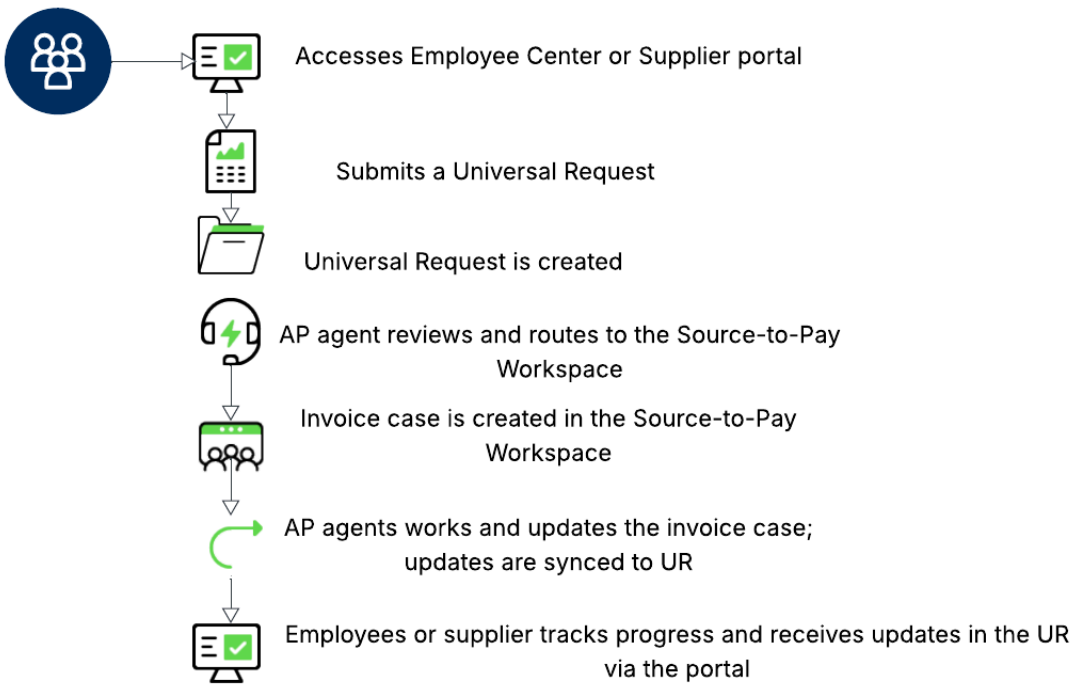
UR can be created by:

- Invoice owners through Employee center. For more information on ServiceNow Universal Request, see Exploring Universal Request
- Suppliers submit inquiry case request or issue (UR) using the Supplier Collaboration portal. For more information on UR from supplier portal, see Create Universal Request from Supplier portal.

How UR works in Accounts Payable Operations

UR seamlessly integrates with the APO system, enabling more efficient management of invoice cases. This integration not only streamlines the overall invoice handling process but also enhances cross-departmental service delivery, confirming that case requests are addressed promptly and accurately across the organization. UR works in APO in the following order:

1. Request submission- Invoice owners or suppliers initiate a UR via the Employee portal or the Supplier portal. The UR records essential information and uses predefined mappings.
2. Routing and case creation-Accounts Payable (AP) agents within the Accounts Payable Universal Request group are authorized to review Universal Requests (URs) and, based on the provided details, can create an invoice case as the primary ticket. This process can be executed either within the Source-to-Pay workspace or directly from the platform.
3. Processing and automation- The updates are synchronized back to the UR. The invoice owner or supplier tracks progress and receives updates through the UR case in the employee portal or supplier portal.



Key features:

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- Both invoice owners and suppliers can submit a single request, eliminating the need to navigate multiple portals and simplifying the initial process.
- Users part of Accounts Payable Universal Request group can check and create primary ticket for invoice case based on the details in the UR.
- Users benefit from consolidated case activity updates, which are accessible from their respective portals. This eliminates the need to switch between systems and provides a seamless tracking experience.

Related topics

Using Invoice Case Management

Create Universal Request from Supplier portal

Create invoice case from Universal Request

AP agents validate the incoming UR requests in the Source-to-Pay workspace and create an invoice case for further processing.

Before you begin

Role required: Users must be part of the Accounts Payable Universal Request group which contains the roles sn_uni_req.routing_agent, sn_ap_cm.agent, [sn_uni_req.sensitiveinfo_agent] optional.

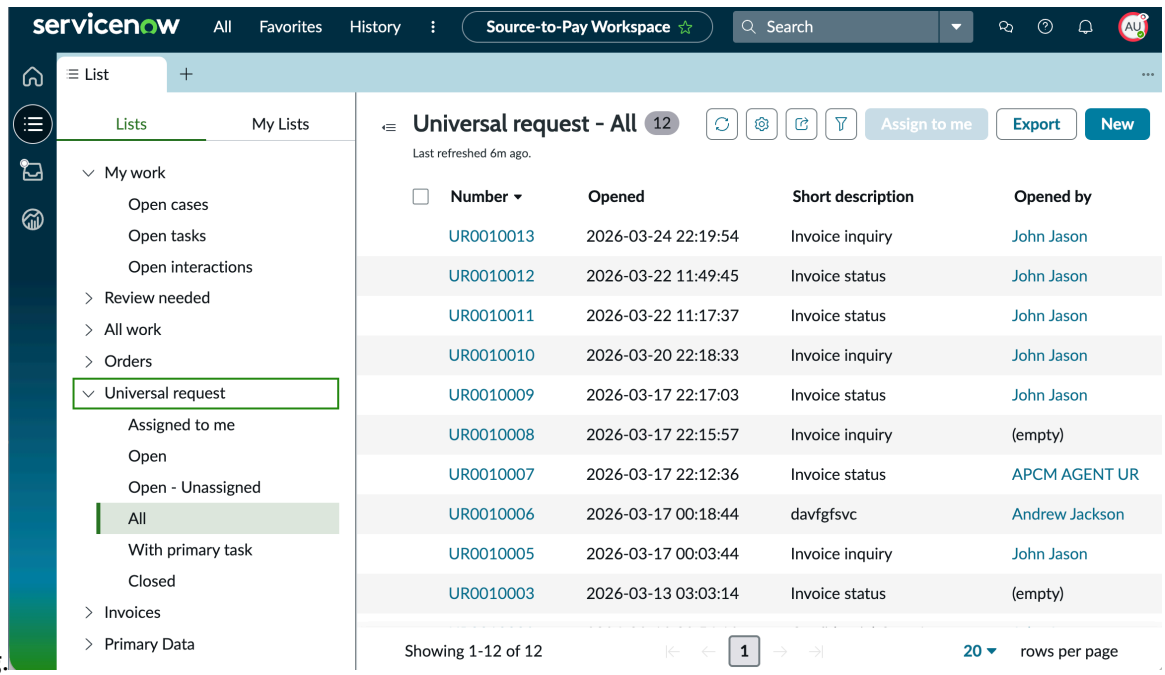
Plugins required:

- Universal Request for Source-to-Pay Operations Plugin [sn_fsc_ur_common] plugin (contains dependent plugin Universal Request Plugin [com.snc.universal_request])
- Invoice Case Management [com.sn_ap_cm].

Users can also create own groups. For more information on creating own service- specific-assignment groups see, Universal Request is raised in the Employee Center or Supplier portal.

Procedure

1. Navigate to **Source-to-Pay workspace** > **List** > **Universal request**.
   The AP agent validates the UR case details and creates an invoice case for further processing.

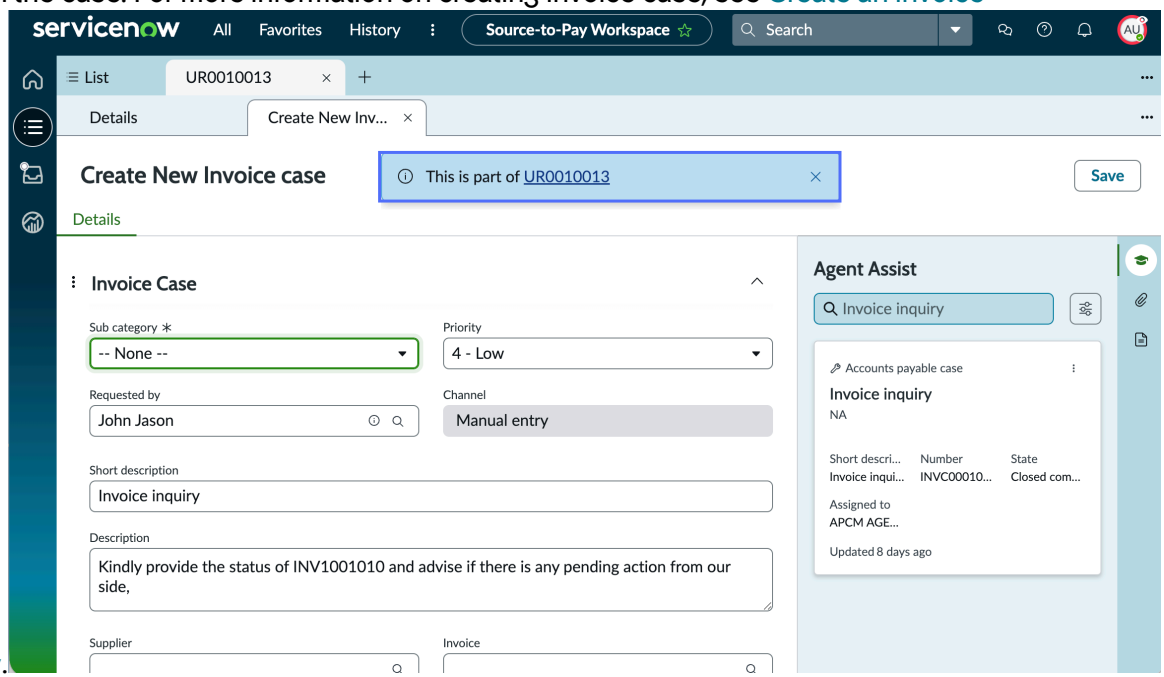


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2. Select a specific UR case to view case details.

   Note: Users with [sn_uni_req.sensitiveinfo_agent] role can view and work on the tickets that are marked as restricted. Restricted tickets contain sensitive information and are secured from general viewing.

3. Select **Create case** >**Create invoice case**.
   The **Create New Invoice case** form appears. The associated UR details appear as a banner in the case. For more information on creating invoice case, see Create an invoice manually.

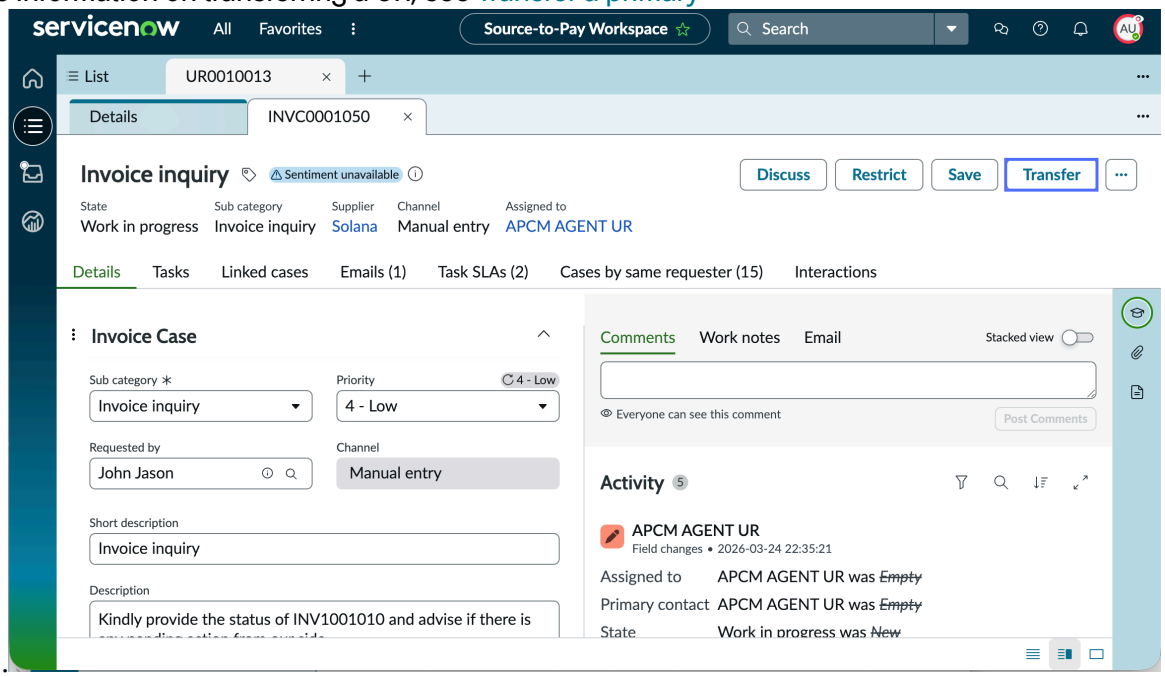


4. Select **Save** to save the changes.
5. Select **Transfer** if the primary ticket belongs to a different team.

   If a ticket is transferred to another team and the user who submitted the UR doesn't have the necessary permissions to access that team's case, updates to the UR will not be visible to them.

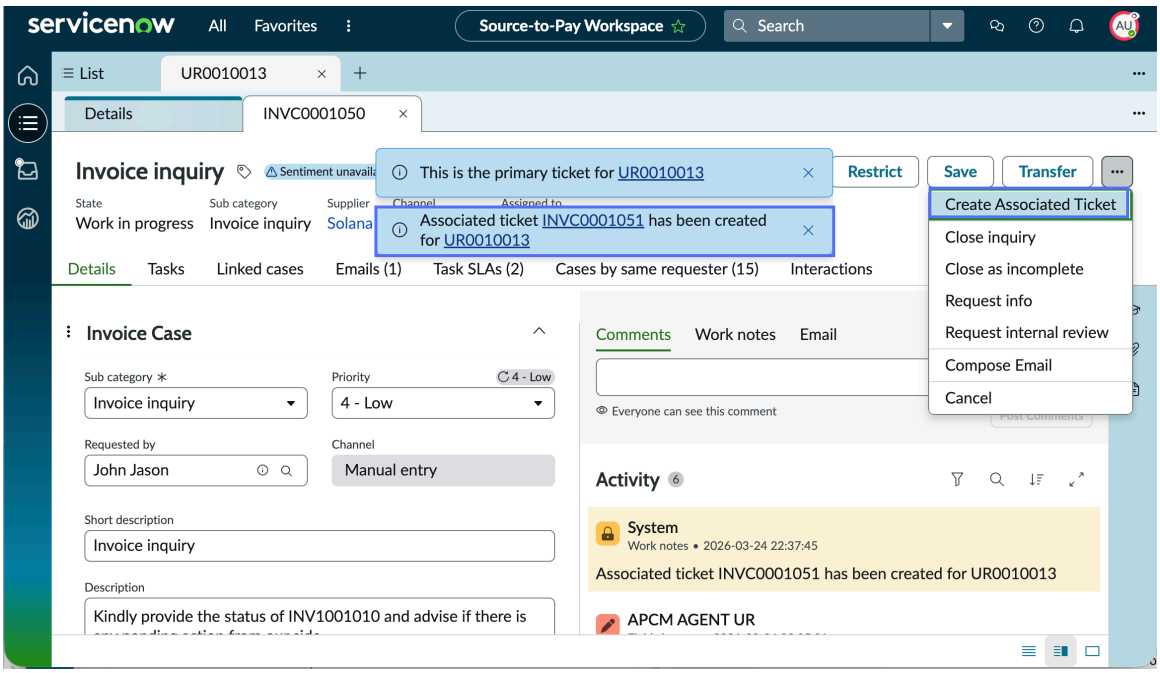
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For more information on transferring a UR, see Transfer a primary ticket.



6. Select **Create Associated Ticket** to request other departments for assistance in resolving a universal request (UR).
   For more information on associated ticket, see Create associated ticket for primary ticket of UR.

   If the ticket is assigned to another team, and the original user who submitted the UR doesn't possess the necessary privileges or access to view that team's case, they'll be unable to monitor updates on the UR.



   An associated ticket is created.

Result

Invoice case is created and processed. Once the case is resolved, the agent closes the case with appropriate reason. The UR is synced with invoice case details for invoice owners and suppliers to track the status of the UR.

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Related topics

Using Invoice Case Management

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

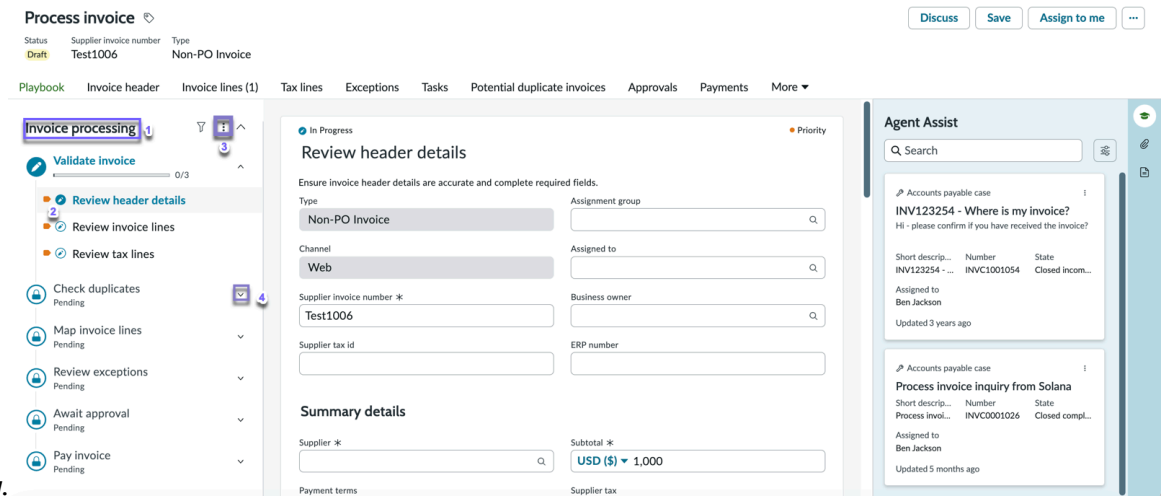
For more information about the workflow of playbooks, see Process Automation Designer.

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 playbook workflow is shown below.



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 **Source-to-Pay Workspace** > **All** > **Accounts Payable Operations**.
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. The **Classify documents** swim lane appears and prompts you to verify the invoice classification. The Classify documents swim lane appears if the document classification skill is activated. For more information on document classification, see Configure Accounts payable document classification skill.

   a. Select the **Review header** details.
      Review the invoice header details and make any required changes.

   b. Select **Save**.

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c. Select **Continue** to move to the next activity in the playbook.

d. Select the **Review invoice lines** activity.
Manually review the invoice lines associated with the invoice processing case.

e. When tax integration is disabled, you can create tax lines from related list of invoice lines or invoice case.

f. Select **Add new invoice lines** to create invoice lines.

g. Select **Continue** to move to the next activity in the playbook.

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 **Supplier tax** details.

o. Select **Add tax**.
The tax lines are added to the invoice line.

p. 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 **Map invoice 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 **Map invoice 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 **Map invoice lines** card.

   b. Verify the **Verify Purchase Order** card.
      Verify the purchase order details associated with an invoice.

   c. You can edit the changes to the purchase order form and select **Update**.

   d. Select **Continue** after you save the changes.

   e. In the **Review PO line mapping** card, review the PO lines associated with the purchase order to identify the lines that is mapped to the invoice line.

   f. You can edit the invoice lines and match the invoice lines with the corresponding purchase order lines.

   The swim lane moves to **Review compliance**. For more details on tax compliance, see Tax integration in playbook.

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 re-evaluate the exceptions.
      For Valid coding required exception, the exception engine is trained to provide recommendations from Agentic AI. The status of the exception is set to **Review needed**.

   c. The APS manually reviews and verifies the suggestion by selecting **Accept suggestion** and **Save**.

   d. After all the exceptions are resolved in an invoice line, the status of the exception changes to **Complete**.

   e. Select **Review exception tasks** to resolve exception tasks if any.

   f. 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.

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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.

    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
- Extract data when Document Intelligence fails
- Extract data when Document Intelligence is unavailable

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.

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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**.

   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.

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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.**
   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.

Supplier Portal Collaboration header

The portal header is located at the top-right corner of the home page contains the following options.

Supplier collaboration portal header options

Option	Description
My Tasks	Lists all the tasks that are assigned to the logged-in user. For more information on

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Supplier collaboration portal header options (continued)

Option	Description
	tasks, see Working with tasks in Supplier Collaboration Portal header.
My Requests	Opens the My Requests page, which lists all the requests assigned to you.
Submit a request	Supplier raises invoice requests.

For more information regarding the Supplier Portal Collaboration header options, see Working with tasks in Supplier Collaboration Portal header.

Supplier Collaboration Portal widgets

The Supplier Collaboration Portal integrated with Accounts Payable Operations consists of the following widgets. For more information on Supplier Collaboration Portal widgets, see Supplier Collaboration Portal.

My active items widget

As a supplier contact, you can view specific items from the following tiles in the **My active items** widget:

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 **My Requests** widget, see Working with My Requests.

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For more information on installing Supplier Collaboration Portal, see Configure Supplier Lifecycle Operations.

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.

Option	Description
Number	An auto-generated number that uniquely iden tifies the task.
Due Date	The assigned date by which the task must be completed.
State	The current state of the task. The states are:

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Option	Description
	○ New ○ Assigned ○ Work in progress ○ Closed complete ○ Closed incomplete
Supplier	Name of the supplier
Supplier invoice number	The invoice number of the supplier invoice.
Purchase order	Purchase order number related to the invoice.
Amount invoiced (Transaction currency)	Charges applied on the invoice.
Description	Detailed description about the task.
Activity	Lists the activity postings between Accounts Payable Specialist and supplier.
Attachments	Supplier uses attachments in the form of PDF, JPEG, PNG formats.

3. On the **Invoice case** task form, you can view the following.

Option	Description
Number	Auto-generated number that uniquely identi fies the invoice case.
Due Date	The assigned date by which the task must to be completed.
State	The current state of the task. The states are: ○ New ○ Assigned ○ Work in progress ○ Closed complete ○ Closed incomplete
Supplier invoice number	The invoice number of the supplier invoice.
Purchase order	Purchase order number related to the invoice.
Parent case	Name of the parent case assigned to.
Description	Detailed description about the task.
Activity	Lists the activity postings between Accounts Payable Specialist and supplier.

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Option	Description
Attachments	Supplier uses attachments in the form of PDF, JPEG, PNG formats.

Supplier selects **Mark complete**. The status of the task changes to **Closed complete**. For more information on invoice case, see Using Invoice Case Management.

Working with My Requests

View and respond to invoice inquiries.

Before you begin

Role required: Supplier

Procedure

1. Navigate to the header on the home page > **My Requests**.
   Lists all the invoice inquiry cases assigned to supplier. For more information on invoice inquiry cases, see Invoice inquiry cases.
2. You can apply filter on **View** option which will display the open and closed requests.
3. Use the **Search open requests** option to search for a specific request using the inquiry number.
4. Open a **Invoice inquiry** case.
   The **Invoice inquiry** form appears.
5. On the **Invoice inquiry** form, perform the following.

Option	Description
Number	Auto-populates the invoice number associat ed with the inquiry.
State	Displays the current state of the **Invoice in quiry**.
Updated	Number of days the record was last updated.
Created	Number of days the record was created on.
Requested by	Auto-populated name of the requester.
Supplier invoice number	Supplier invoice number to which the inquiry is related to.
Due date	Last date to approve the request by the sup plier.
Description	Detailed description about the invoice in quiry.
Activity	Supplier posts comments related to the in voice inquiry.
Attachments	Invoice attachments in the form of jpeg, png.

The Accounts Payable agent interacts with the supplier and updates the inquiry case using the **Activity** option.

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Create Universal Request from Supplier portal

Suppliers submit their invoice inquiries through **Request help**, which transfers to a Universal Request (UR). Requests are sent directly to the Source-to-Pay Workspace for further processing.

Before you begin

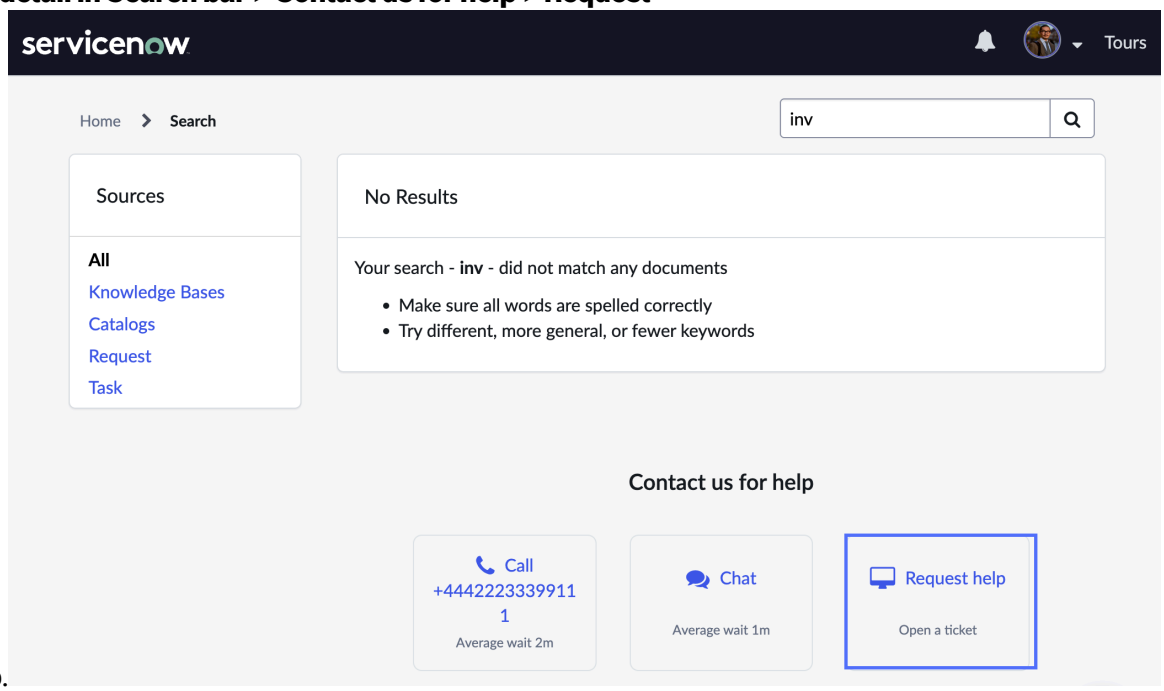
Role required: sn_slm.contact

Plugins required:

- Universal Request for Source-to-Pay Operations Plugin [sn_fsc_ur_common] plugin (contains dependent plugin Universal Request Plugin [com.snc.universal_request])
- Supplier Common Architecture [com.snc.sn_slm]
- Invoice Case Management [com.sn_ap_cm].

Procedure

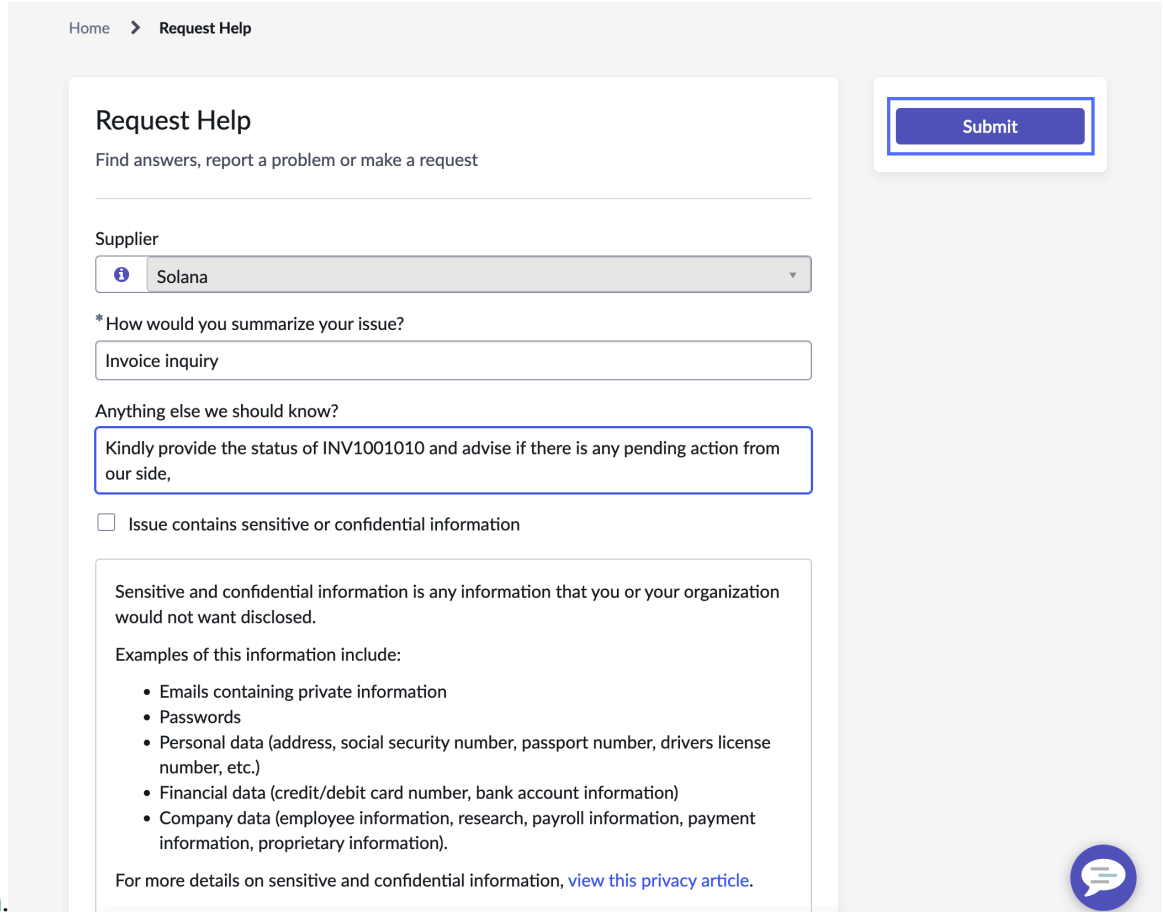
1. Navigate to **Supplier Collaboration Portal** > **Search for any detail in Search bar** > **Contact us for help** > **Request help**.



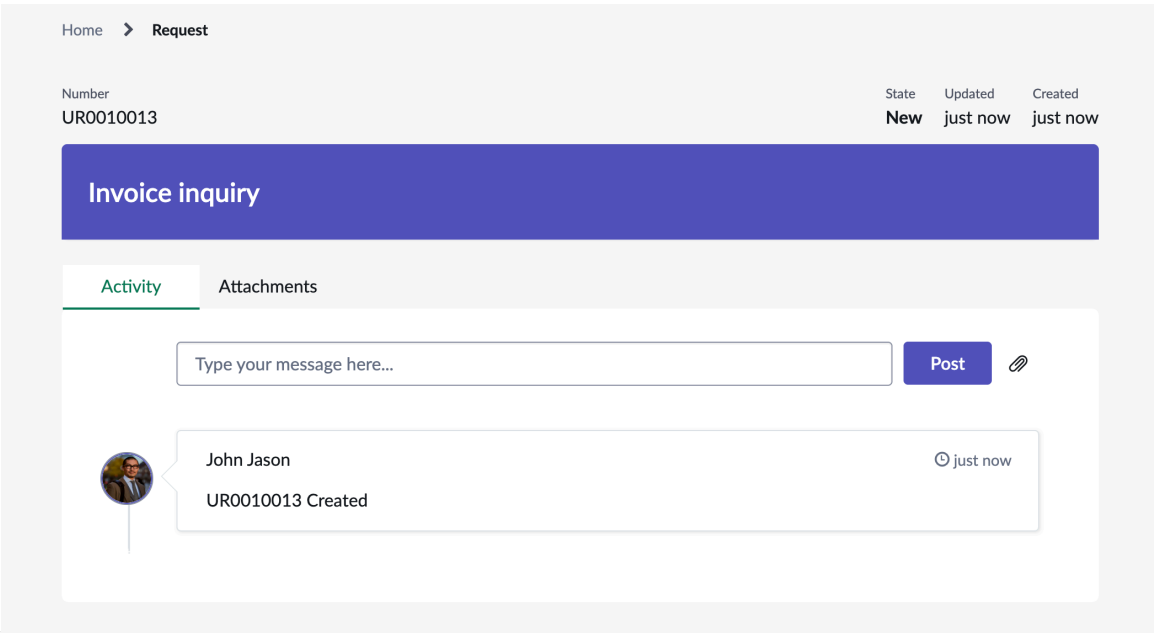
2. Select **Request Help** to create a UR.

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The Request Help form appears. For more information on the fields in the form, see Request Help form.



3. Select **Submit**.



Result

The Universal Request is created.

Related topics

Universal Request in Accounts Payable Operations

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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** with category as **Invoices**. By default, the **Invoices** tab is selected and displayed in the **Card View**. You can toggle between **Card view** and **Table view**.

Many-to-many (M2M) mapping between supplier contact and suppliers enable one supplier contact to be the contact for multiple suppliers, provided the suppliers share a parent-subsidiary relationship. To view the list of suppliers associated with supplier contact (M2M) in the Supplier Collaboration Portal, the admin must create and execute a fix script. For more information on creating fix scripts for M2M mapping, see Enable M2M mapping between supplier contact and suppliers.

Note: You can also select an **Raise a request** option in the Supplier Collaboration Portal header to perform the following actions.

- Submit Invoice Inquiry
- Submit new Invoice

Submit Invoice Inquiry

Supplier uses the Supplier Collaboration Portal to create an inquiry related to an invoice and submits it to the Accounts Payable Operations team to evaluate and resolve the inquiry.

Before you begin

Role required: Supplier

Procedure

1. Navigate to **Supplier Catalog** > **Invoices** > **Submit an invoice inquiry**.
2. On the **Submit an invoice inquiry** form, enter the following details.

Question	Description
Which supplier?	Supplier- Displays the name of the supplier associated with the supplier contact based on your selection from the **My Company**tab.
What invoice would you like to inquire about?	Invoice number- Choose the invoice number on which you need to inquire from the drop-down list. The drop-down lists the invoice numbers of the supplier displayed in **Which supplier?** field.
What kind of invoice inquiry would you like to make?	Inquiry type- Choose the type of inquiry that you would like to ask an Account Payable Spe cialist. The options are: ○ Payment inquiry ○ Invoice inquiry ○ Expedite payment request ○ Payment term issue ○ Invoice entry assistance

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Question	Description
	For more information on invoice inquiry, see Invoice inquiry cases.
Please describe your inquiry below in de tail:	Description- Detailed description about the in voice inquiry.

3. Select **Submit**.
   A pop-up alert message appears as " Your inquiry is submitted and we will respond soon. You can review details here: <<Invoice case number>>.

   Note: From the invoice form page, you can select **Actions** > **Create new inquiry** and submit an invoice inquiry.

   Invoice inquiry case is created.

Submit new Invoice

Supplier creates and submits an invoice requesting for payment from Accounts Payable Operations team. The invoices are of type PO-invoice or Non-PO invoice.

Before you begin

Role required: Supplier

Procedure

1. Navigate to **Supplier Catalog** > **Invoices** > **Submit new invoice**.
2. On the **Submit new invoice** form, enter the following details.

Question	Description
What type of invoice are you submitting?	Invoice type- Choose the invoice type for pro cessing from the drop-down list. The options are: ○ PO invoice- The **Purchase order** drop-down appears. Choose the purchase order from the drop-down that you would like to associate with the invoice. ○ Non-PO invoice- Browse and attach the in voice for the Accounts Payable Operations team to create an invoice processing case.

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Question	Description
	Note: ▪ If you select Invoice type as Non-PO, and upload an invoice copy with purchase order, DocIntel processes the invoice as a valid PO invoice. ▪ If you select Invoice type as PO in voice and enter purchase order number but Doc Intel is unable to extract the purchase order details, then the purchase order that you selected from the **Purchase order** drop-down list will be considered and processed. For more information on invoice case, see Create New Invoice form. Supplier- Displays the name of the supplier associated with the supplier contact based on your selection from the **My Company**tab. The **Purchase order** drop-down lists the de tails associated with the selected supplier.

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.

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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

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.

.

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.

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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.

AI worker case resolution confirmation

AI worker agent marks invoice cases as resolved and triggers supplier confirmation through Supplier Collaboration Portal.

When an AI worker completes the resolution of an invoice inquiry case (and payment inquiry) in APO, marking the case as resolved initiates an automated confirmation workflow. This workflow delivers the resolution request to the external supplier through multiple channels: the Supplier Collaboration Portal. Supplier responses are tracked and confirmation status is visible, enabling timely case closure after supplier validation is received.

How it works

When an AI worker provides a resolution to an invoice case through the activity stream, the worker marks the case as resolved by updating the case state to **Awaiting acceptance**. This state change triggers an automated supplier confirmation workflow.

The workflow performs the following actions:

- Captures the resolution details provided by the AI worker.
- Identifies the supplier contact associated with the case.
- Prepares a confirmation request message containing the resolution details.
- Delivers the confirmation request through Supplier Collaboration Portal
- Initiates tracking and monitoring of the supplier's response.

The supplier receives the confirmation request and uses the Supplier Collaboration Portal to validate or challenge the resolution. The supplier's response is recorded, the case status is updated accordingly, and the AI worker and relevant team members are notified of the outcome.

Invoice case resolution using AI worker

Mark an invoice inquiry case and payment inquiry as resolved to start an automated workflow that requests supplier confirmation through Supplier Collaboration Portal.

Before you begin

- Case resolution is recorded in the activity stream.
- The supplier contact email address must be registered in the system.

Role required: admin

About this task

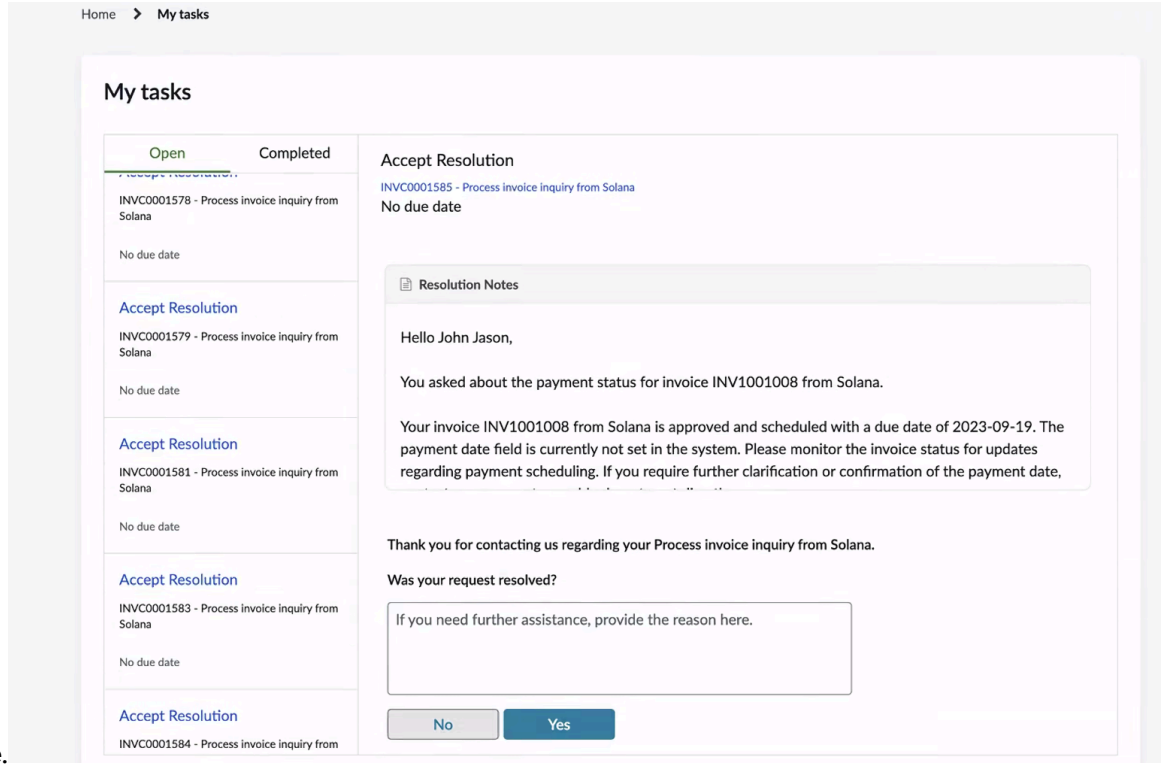
Mark a supplier invoice case as resolved after completing your investigation and accepting the resolution.

Procedure

1. Navigate to **Supplier Collaboration Portal** > **My Tasks** > **Open**.
   A notification appears with a request to Accept resolution. Review the resolution details.

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2. Select the appropriate action button:
   - Select **Yes** if the resolution resolves your issue. The invoice case is auto-closed.
   - Select **No** if you need more help or the resolution does not address your concern. The system changes the Assignment group to AP supplier services, and an AP specialist investigates the case.



> **Note:** When a resolution is provided and the case is in **Awaiting acceptance** state, if there is no activity on the case from supplier for 72 hours, a scheduled job closes the case automatically.

Email resolution notifications for APO

AI worker agent resolves the case and moves it to awaiting acceptance, then sends an email with resolution details and accept/reject buttons.

The Accounts Payable Operations email resolution notification feature streamlines how suppliers and invoice owners receive updates about their Accounts Payable Operations cases. When a case is resolved and requires your acceptance or confirmation, you receive an email with the complete resolution details. The email includes action buttons that enables you to respond directly from your inbox, without needing to log in to the portal or navigate to a separate website.

Key benefits

- Faster resolution: Receive resolution updates immediately and respond from your email inbox.
- Clear communication: Resolution details are presented directly in the email, eliminating the need to check a portal.
- Streamlined response: Accept or reject resolutions with a single "click" using the action buttons.
- Consistent behavior: Email buttons work the same way as portal actions for a seamless experience.
- Reduced effort: No login required to respond to resolution notifications.

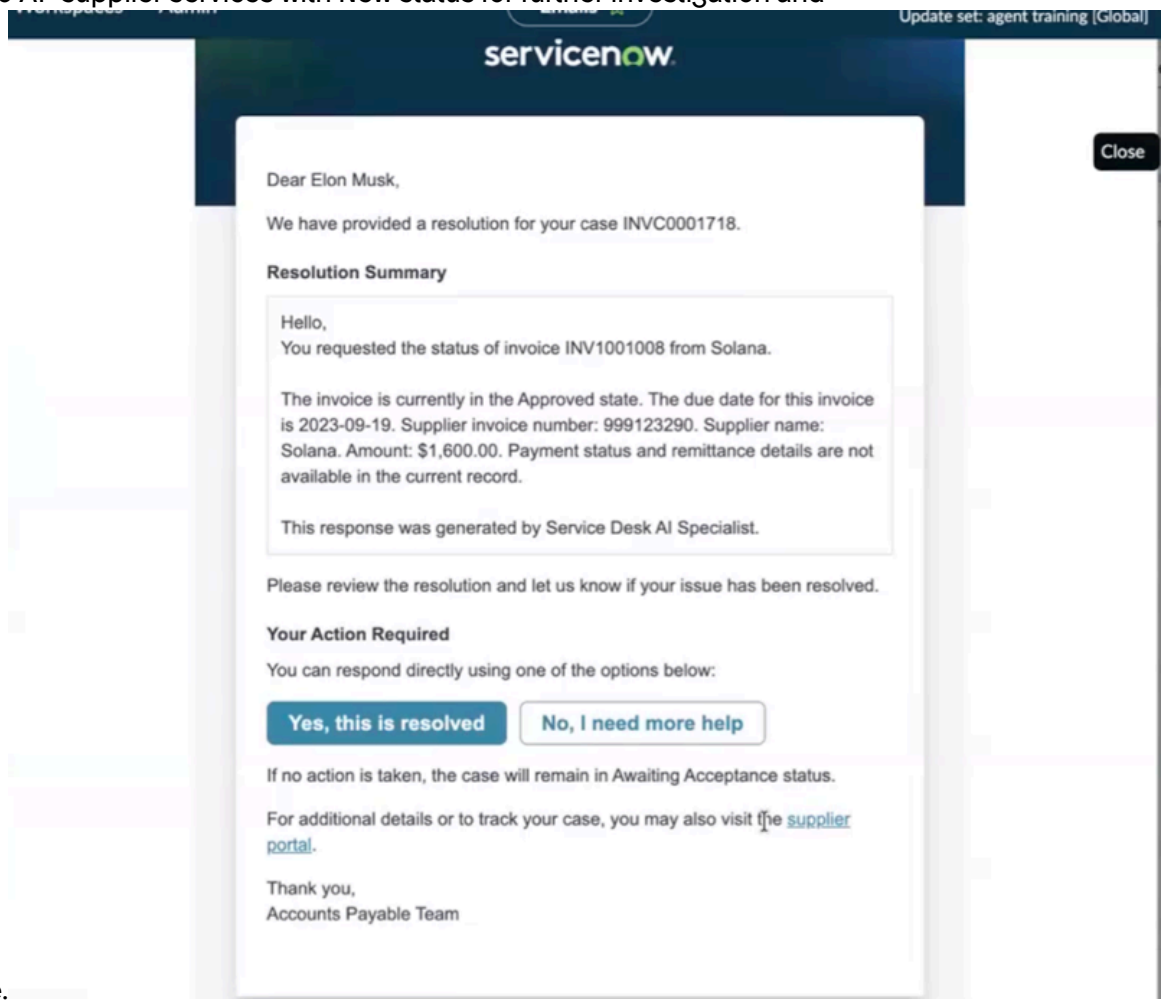
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How it works

When your Accounts Payable Operations case receives a resolution, the AI worker agent updates the case status to "Awaiting acceptance" to indicate that your confirmation or feedback is needed. The system automatically sends an email notification to your registered email address. The email contains the following:

- The case reference number and case summary
- Complete resolution details provided by the AI worker agent
- Two action buttons: "Yes, this is resolved" and "No, I need more help"

When you select one of the action buttons, your response is recorded and the case status is updated accordingly. If you accept the resolution, the case closes. If you reject the resolution and request more help, the case is assigned to AP supplier services with New status for further investigation and assistance.



When notifications are sent

Email resolution notifications are sent in the following circumstances:

- A resolution has been provided to your case by the AI worker agent.
- The case status has been changed to "Awaiting acceptance."
- Your email address is registered in the system as the case requester or supplier contact.

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Respond to an email resolution notification

When you receive an email resolution notification for your Accounts Payable Operations case, use the action buttons to accept or reject the resolution.

About this task

Use this procedure to respond to an email resolution notification from the Accounts Payable Operations team. Your response confirms whether the provided resolution addresses your concern. The action buttons in the email allows you to respond without logging into the portal or visiting a website.

Before you begin

Role required: admin

Procedure

1. Open the email resolution notification from the Accounts Payable Operations team.

   The email is sent to the email address registered for your supplier account. Look for an email with the subject containing your case reference number.

2. Review the resolution details provided in the email.

   The email includes the following information:

   - Case reference number and case summary
   - Complete resolution details and explanation from the APO team
   - Any supporting documentation or details relevant to your case

3. Evaluate whether the resolution resolves your issue.
4. Select the appropriate action button:
   - If the resolution resolves your issue: Select the **Yes, this is resolved** button.
   - If you need more help or the resolution does not address your concern: Select the **No, I need more help** button.

Result

Your response is recorded immediately and the case status is updated:

- **If you selected "Yes, this is resolved":** The case closes and is marked as resolved. You receive a confirmation email acknowledging your acceptance of the resolution.
- **If you selected "No, I need more help":** The case status changes to New and the Assignment group is changed to AP supplier services. The Accounts Payable Operations specialist investigates the case.

In either case, your response is processed automatically, and you don't take any additional action.

What to do next

Monitor your email for follow-up communications from the Accounts Payable Operations team. If you selected "No, I need more help," the team will continue working on your case and send you updates as progress is made.

Related topics

Email resolution notifications for APO

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Integrate Accounts Payable Operations with other applications

Accounts Payable Operations integrates with ERP systems, Document Intelligence, IT Asset Management, and other business applications to enable bidirectional data exchange and automated invoice processing.

Accounts Payable Operations integrations

Accounts Payable Operations supports the following integrations:

Integration framework

Invoice integration enables bidirectional data exchange with ERP systems for ingestion, posting, and synchronization. For more information, see Accounts Payable Operations integration framework.

IT Asset Management purchase order invoice processing

IT Asset Management invoice exceptions for purchase orders are automatically handled through quantity validation, discrepancy notifications, and revalidation. For more information, see IT Asset Management purchase order invoice processing.

Third-party application integrations

Accounts Payable Operations integrates with the following third-party ERP applications.

ERP Integration Framework

The Source-to-Pay Operations ERP Integration Framework connects ServiceNow® with third-party ERP systems, enabling data exchange for purchase orders, receipts, invoices, fixed assets, and tax information across multiple ERP instances.

For more information, see ERP Integration Framework.

Accounts Payable Operations integration with SAP

Post and synchronize invoices between Accounts Payable Operations and SAP ECC and SAP S/4HANA through bidirectional data exchange.

For more information, see Source-to-Pay integration with SAP.

Accounts Payable Operations integration with Oracle EBS

Post, synchronize, and reconcile invoices in Oracle EBS from your ServiceNow® instance.

For more information, see Source-to-Pay integration with Oracle EBS.

Accounts Payable Operations integration with SAP Ariba

Post, synchronize, and reconcile invoices in SAP Ariba from your ServiceNow® instance.

For more information, see Source-to-Pay integration with SAP Ariba.

Accounts Payable Operations integration with Coupa

Post, synchronize, and reconcile invoices in Coupa from your ServiceNow® instance.

For more information, see Source-to-Pay integration with Coupa.

Accounts Payable Operations integration framework

Invoice integration facilitates inbound and outbound integration with third party applications or any external systems into the ServiceNow® application.

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The integration framework consists of inbound invoice and outbound invoice interface tables. Invoice integration involves the transfer of invoice and invoice line data by running transform maps through various sources or external systems. For more information on integration, see Integration Hub.

The integration framework enables the following use cases:

- Ingest invoices from external sources - The invoice data is extracted from ERP sources into ServiceNow® inbound staging tables and is referred as inbound integration.
- Post invoices into ERP- The invoice and invoice line data with **Approved** status is synchronized with ServiceNow® outbound invoice and invoice line tables. The integration status is set to **New** and is referred as outbound integration.
- Ingest invoice payment details from ERP- The ERP number received from the third party application is updated in the invoice table with payment status as **Pending Payment**. The supplier selects the payment method, proceeds with the payment and sets the payment status as **Paid**.

For example, You're receiving invoice data from various sources. The invoice data is transferred to inbound invoice and invoice lines if the required fields are set on the invoice. For more information on the required fields, see Inbound Invoice Fields and Inbound invoice line fields. The invoice status changes to **Approved** and the invoice data is transferred to outbound invoice tables. The outbound invoice displays the integration status as **New**. The ERP integrator fetches the outbound invoices with status as **New**, creates a record in the third party application and sets the integration status to **In progress**. After the outbound data is successfully processed by the third party application, the system auto updates the ERP number in the outbound invoice tables and sets the integration status to **Processed**. The ERP number is updated in the invoice table with payment status set to **Pending Payment**.The supplier verifies the invoice payment details, proceeds with the payment and the payment status is set to **Paid**. For more information on payment fields, see Inbound invoice payment fields.

The advantages of integration framework are:

- Expedites the integration of the Accounts Payable Operations application with external systems and reduces the time to verify invoices. Integration framework enables bulk import of invoice and invoice line data through scheduled jobs. A scheduled job runs every 30 minutes, verifies, and auto process the invoices. Scheduled jobs result in increased efficiency of creating invoices.
- Expedite the payment processing process and enhance the user experience by seamlessly exchanging data with external systems.

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 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.

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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.

When invoice and invoice lines ingested by DocIntel or integration can result in errors

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 too. For more information on the home page, see APO landing page.

When the Accounts Payable Operations admin closes the integration error task and resubmits the invoice to ERP, the following actions occur in the Outbound Invoice record.

- A new outbound invoice record is created
- The ERP admin reviews the outbound invoice record with status **New** updates the ERP number, ERP line number, and ERP posting date
- The ERP admin changes the **Integration status** to processed
- The invoice processing case changes status to pending payment, and the review payments activity card is auto-selected

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 **Submit 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 error task.

Before you begin

Role required: Accounts Payable admin

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Procedure

1. Navigate to **All** > **Source-to-Pay Workspace** > **Accounts Payable Operations**.
   The Accounts Payable Operations landing page appears.
2. Click **ERP Posting error**.
   The **ERP Posting error invoices** page lists the invoice cases with **ERP integration status** as **Failed**.
3. Click 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 the invoice details are correct.
4. Click 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. Click **Save**.
   The changes to the forms are saved.
8. Click **Send to ERP**.
   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**.
9. In the invoice **Details** tab, the **Status** is auto-updated as **Pending payment**.
10. Click **Review Payments**.
    For more information on payment fields, see Inbound invoice payment fields.
    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 the Create an Excel template file to enter data dialog box, 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**. The invoice is extracted for payment, and the invoice status is set to **Paid**.

IT Asset Management purchase order invoice processing

The integration of IT Asset Management (com.snc.sn_spend_asset) with Sourcing and Procurement Operation enhances exception handling for ITAM-driven purchase order invoices in Accounts Payable Operations APO (app-spend-itam), enhancing accurate routing and faster resolution while improving overall operational efficiency.

In IT Asset Management (ITAM), assets are created when you acknowledge the receipt of the requested items. As part of the Better Together integration, all the received asset is handled within IT Asset Management (ITAM).

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After receiving of the goods is completed, receiving slips are generated in ITAM. You can view the created assets in the **Assets** tab of the ITAM purchase order. For more information, see Receiving assets in Asset Management.

During the invoicing process, Accounts Payable Operations checks if the purchase order originates from ITAM using the reference field. It validates the received quantity against the purchase order using the receiving slips and if discrepancies are found, then insufficient goods receipt exception is triggered. APO automatically triggers an email and notifies the ITAM 'Assigned to' user mentioned in the ITAM PO about the exception. Once the exceptions are resolved, APO automatically re-validates the invoices. The invoice status changes from “Review Needed” to “Review Complete”.

The benefits of Better Together integration with ITAM are:

- Leverage APO functionalities and process invoices faster and efficiently
- Automated exception handling for ITAM-PO invoices becomes more accurate and timely
- Operational efficiency and reduced manual intervention

Plugin dependencies for the APO-ITAM better together feature

The following are the plugin dependencies that are required to use Asset Management Integration for Accounts Payable Operations:

- Invoice Case Management [sn_ap_cm]
- Accounts Payable Operations [sn_ap_apm]
- Accounts Payable Invoice Processing [sn_pr]
- Accounts Payable Operations with Document Intelligence [sn_ap_ic]
- Asset Management Integration for Sourcing and Procurement Operations plugin [sn_spend_asset]
- Source-to-Pay Common Architecture [sn_shop]
- Source-to-Pay Integration Framework [sn_spend_intg]
- Supplier Common Architecture [sn_slm]
- Common Service Delivery [sn_spend_sdc]
- Source-to-Pay Workspace [sn_spend_workspace]
- Supplier Collaboration Portal [sn_supplier_sp]
- ERP Integration Framework [sn_fcms_intg]
- Finance Common Architecture [sn_fin]

Invoice processing using IT Asset Management purchase order

The ITAM-APO integration is designed to streamline invoice processing for ITAM-related purchase orders (POs), verifying better accuracy, exception handling, and operational efficiency.

Before you begin

Role required: Accounts_payable_specialist [sn_ap_apm.accounts_payable_specialist]

Procedure

1. Navigate to **Source-to-Workspace** > **Accounts Payable Operations**.
2. Create a purchase order in ITAM.
   For more information on creating purchase order in ITAM, see Create a purchase order.

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3. Create an invoice with the ITAM purchase order.
   For more information on invoices, Create an invoice manually. The Accounts Payable Operations checks whether the received quantity in the ITAM receiving slip matches the invoiced quantity. In case of mismatch, an insufficient goods receipt exception is triggered and automatically the ITAM user is notified through email. For more information on exceptions, see Invoice exceptions.
4. The Accounts Payable Operations automatically verifies and revalidates the invoice.

Result
The invoice processing of ITAM purchase order is successfully performed.

Tax Engine Integration

Integrate an external tax engine to validate supplier-provided taxes against calculated from external tax engines resulting in accurate, compliant, straight through processing and improving efficiency.

The Accounts Payable invoice processing invokes the external tax engine to validate supplier tax (based on ship to, item, service, category, amounts, jurisdiction, exemptions, other tax configuration) against system tax and drive straight through processing for matching outcomes. During invoice data extraction, the tax rate and tax amount will be stored as supplier tax rate and supplier tax amount at both header and invoice line levels. Tax integration is applicable for invoices of type PO, Non-PO and credit memo; supporting automatic, manual, and scheduled tax validation ensuring taxes remain correct even when invoices change or temporary integration issues occur.

How system tax is calculated-When invoice data is submitted to the external tax engine, the system receives the calculated tax amounts based on the invoice details and configuration. The system uses this response to automatically generate tax lines. The generated tax lines are then validated against the supplier-provided taxes at the header and line levels.

Tax integration is triggered for invoices:

- For Non- PO invoices, after the invoice state is changed to accepted state.
- For PO invoices, after the PO matching state is completed.

Key capabilities

- External tax engine integration- Connects to enterprise tax engines using integration framework.
- Intelligent tax calculation- System validates supplier tax against system tax using invoice fields (based on ship to, item, service, amounts, jurisdiction, exemptions, customer tax configuration).
- Granular comparison logic-
  - Line-level and Header-level validation- The extracted values are stored as it is and the system compares tax at the invoice line item and header level for maximum accuracy.
  - Configurable tolerance-Define acceptable variance thresholds. The system auto-approves tax when the variance is within the configurable tolerance.
  - Scheduler based re-calculation- The scheduler will automatically reinitiate the tax integration process for invoices with tax status of integration error, or recalculate tax.

Benefits of Tax Engine integration

Customers using tax engine integration benefit from:

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- Reduced manual effort – Automatic tax calculation and reconciliation removes the need for manual tax line entry.
- Improved accuracy – Taxes are calculated using authoritative third-party tax logic.
- Stronger compliance – Consistent validation across jurisdictions and invoice types.
- Faster invoice processing – Higher straight-through processing rates and fewer exceptions.
- Clear exception visibility – Over-tax and under-tax variances are surfaced at line and header levels.

Tax calculation framework

The tax calculation framework is structured as a modular, three-tier architecture to promote scalability, maintainability, and extensibility. The framework seamlessly integrates Accounts Payable Operations and the external Tax engine, enabling automated and coordinated tax computation. The validation logic is applied at:

- Line-level and Header-level comparison (primary)- Supplier tax and system tax are compared at the invoice line level and header level for maximum accuracy.
- Configurable tolerance-Customers can define acceptable variance thresholds. Invoices within tolerance are automatically approved.

Components involved in tax calculation framework

Components	Key functions
The Accounts Payable Operations serves as entry point for tax calculation. When an invoice is in PO matching or accepted state in the Accounts Payable Operations, the system determines if tax calculation is required or not.	• If tax calculation is required, then a record is created in the tax staging table [sn_spend_intg_tax_staging], and the tax status is set to in progress. For more information on tax status, see Tax status • If tax calculation isn't required, then the invoice processing continues through the regular exception flow and proceeds to payment.
The Source-to-Pay integration framework is a processing layer between Accounts Payable Operations and the external tax engine.	• The vendor defines the data mapping required by the external tax engine. • Mapping tables are used during request creation (outbound) and response processing (inbound) between APO attributes and Accounts Payable Operations. • Responses from the tax engine are sent back to the staging table. • Invoice tax status is updated based on the response. • Failed records are processed manually. For more information on the tables, see Configuration tables and prerequisites for Tax integration.

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Components involved in tax calculation framework (continued)

Components	Key functions
The external tax engine computes the tax.	Calculates the tax and returns the response. The response is processed, tax lines are created automatically for the applicable invoice in Accounts Payable Operations. The system triggers exception engine based on the response from tax engine. Tax exception is raised when supplier tax and system tax mismatch in the invoice. Invoice tax status is set to integration error and Accounts Payable specialist investigates the case manually. If the invoice is modified after last execution (change amounts, add lines or adjust tax codes), then the tax is recalculated. The tax processing is re-initiated. Upon successful validation, the invoice processing proceeds to payment.

Tax validation modes

Tax calculation and validation can be triggered in multiple ways:

- Automatic (synchronous)-Runs automatically at key invoice processing milestones
- Manual (on-demand)-AP specialists can trigger tax validation during invoice exception review. This is applicable or accessible from the tax exception
- Scheduler re-calculation-Background jobs automatically re-initiate tax validation for invoices that are in progress, or recalculate tax status and integration error status. This ensures taxes stay accurate even if invoice data is updated or external calls fail temporarily.

Tax integration workflow

A high level workflow of how tax integration works in Accounts Payable Operations is shown below.

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Note: If you're upgrading from previous version of APO to latest version, you must execute the scheduled job [APO - close open exception for deactivated exception definition]. This scheduled job updates the status of invoice exceptions to inactive and closes the corresponding invoice exceptions.

Configuration tables and prerequisites for Tax integration

Use the configuration tables to enable tax integration with third-party tax engines.

Configure the following mentioned tables for tax integration with a third-party tax engine.

Configuration tables

Configuration table	Description
S2P Custom Configurations [sn_fin_s2p_custom_config]	Set condition for tax integration for incoming invoices.
S2P Custom Configuration Type [sn_fin_s2p_custom_config_type]	Set condition for configuring type of responses from tax engine.
ERP sources [sn_fin_erp_source]	Review ERP source for tax engine.
Tax type [sn_fin_tax_type]	Match the tax type returned by the external tax engine and associate them with the appropriate ERP source.
Tax integration field mappings [sn_spend_intg_tax_field_map]	Review the mapping between APO field and external tax engine field
Tax attributes for recalculation	Specify the invoice data attributes that must be present to create taxes in the Accounts Payable Operations properties.

Prerequisites for Third-party Tax integration

To enable third-party tax integration, customers must include the following:

The required plugins for third-party tax integration are:

- app-accounts-payable
- app-spend-workspace
- app-spend-catalog
- app-spend-integrations
- app-tax-integration-vertex (if vertex is used as the tax engine)

- Configure connection and credential details for the external tax engine.
- Configure tax management properties and mapping rules.

For configuring tax management properties, see Accounts Payable Operations properties.

Tax integration in playbook

The Accounts Payable Operations playbook enables AP specialists and tax specialists to perform invoice tax validation using tax engine integration. Use the playbook for implementing and viewing the different stages of tax validation using the tax engine integration.

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Before you begin

Role required: AP specialist, tax specialist

Procedure

1. Navigate to **Workspaces** > **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. Invoices can be entered manually or extracted using DocIntel. For more information on invoice extraction, see Configure data extraction modes.
4. Select **View Invoice processing case**.
5. Select **Validate invoice**.

   a. Select the **Review header** details.
   Review the invoice header details and make any required changes. Tax mentioned in the invoice copy is entered or extracted as supplier tax (editable) at header level and the system tax is the sum total of system tax (read only, derived from external tax engine) for all the tax lines.

   b. Select **Save**.

   c. Select **Continue** to move to the next activity in the playbook.

   d. Select the **Review invoice lines** activity and manually review the invoice lines associated with the invoice.

   > **Note:** When tax integration is disabled, you can create tax lines from related list of invoice lines or invoice case. For more information on tax lines in related list see Using Playbook in Accounts Payable Operations. If tax integration is enabled, you can add tax lines using the related list but the tax lines are deleted and new tax lines are added as a response from external tax engine. Tax mentioned for each invoice line in the invoice copy is entered or extracted as supplier tax (editable) at invoice line level and the system tax (read only, derived from external tax engine) is the sum total of system tax (read only) for all the tax lines of that particular invoice line.

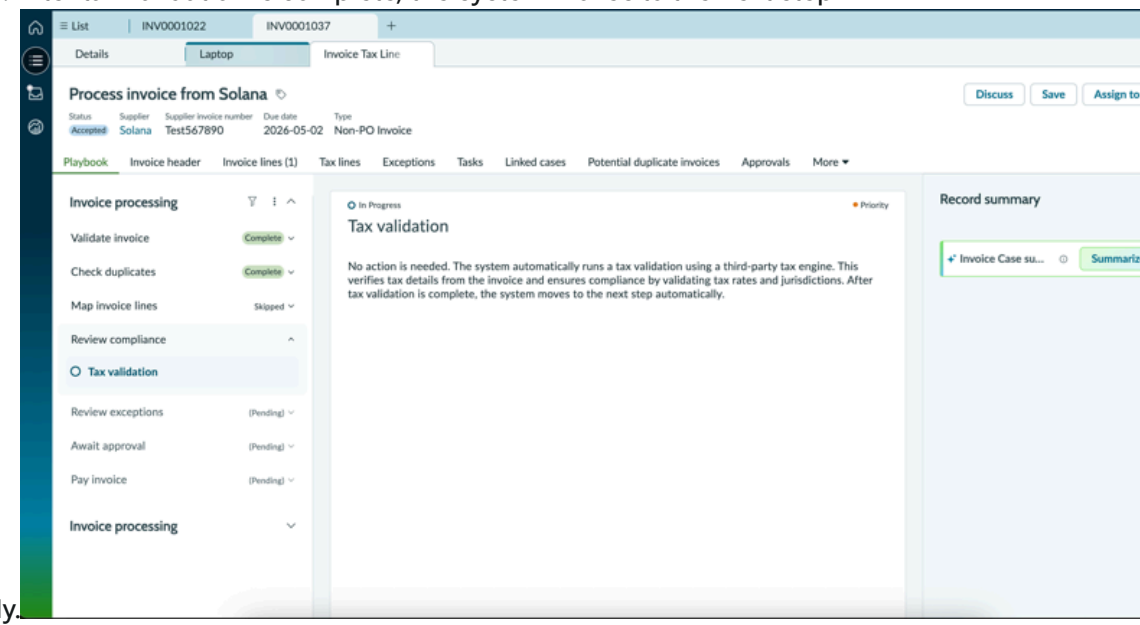
   e. Select **Add new invoice lines** to create invoice lines.

   f. Select **Continue** to move to the next activity in the playbook.

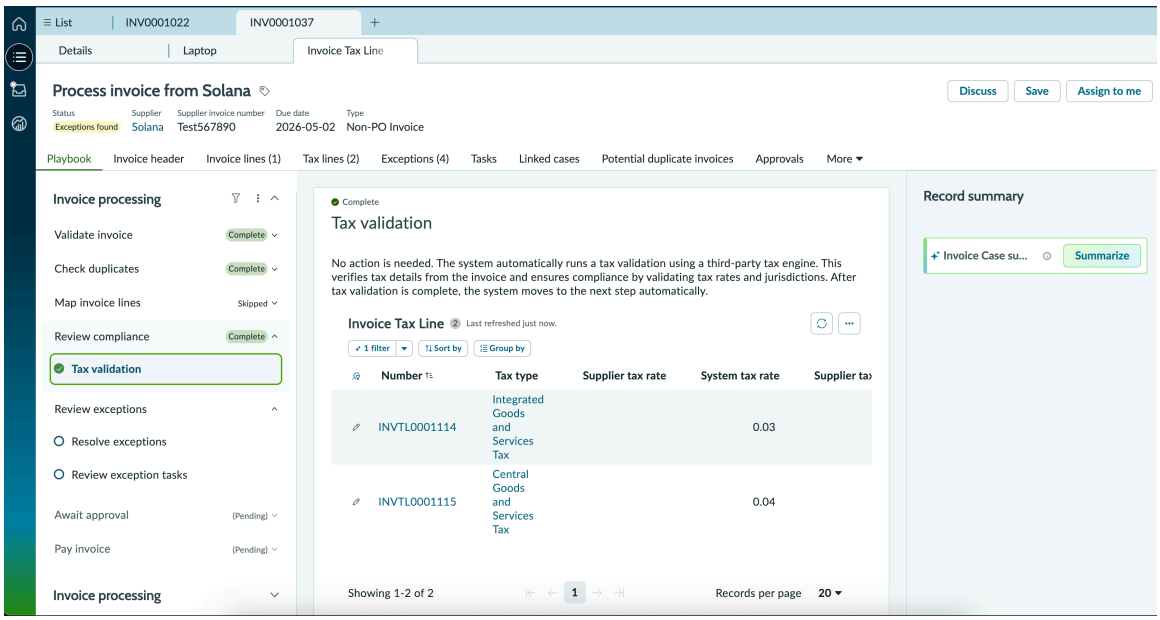
   g. Select **Submit invoice**.

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Note: During invoice processing (straight-through processing), when the invoice is sent to tax engine for validation, you can view the progress in the **Review compliance** swim lane. You will be prompted with a message "No action is needed. The system automatically runs a tax validation using a third-party tax engine. This verifies tax details from the invoice and ensures compliance by validating tax rates and jurisdictions. After tax validation is complete, the system moves to the next step automatically.

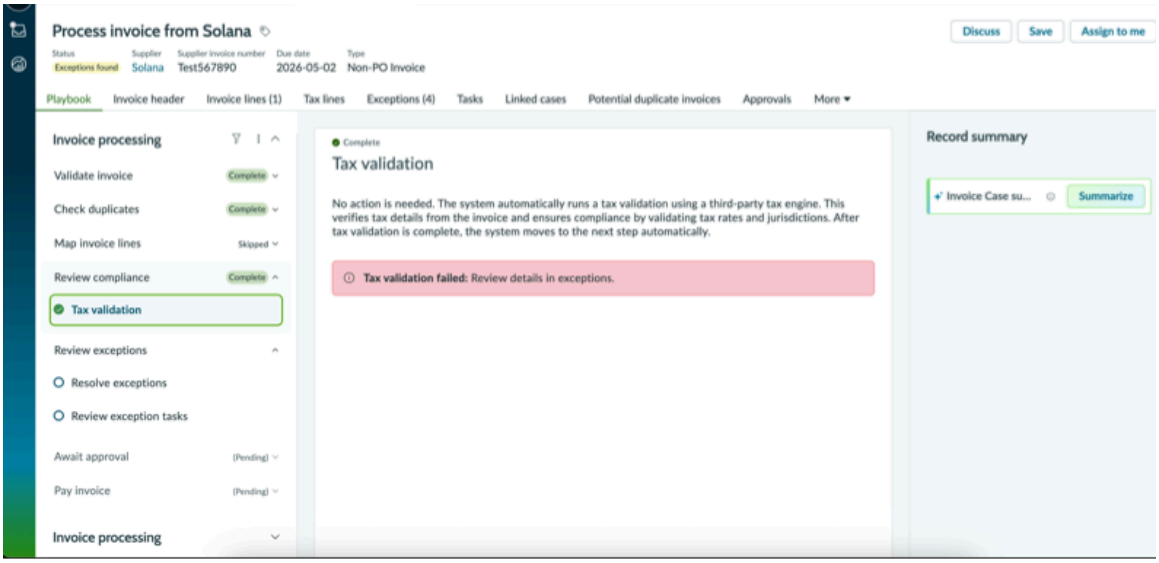


Tax Validation in progress.



Tax Validation successful.

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Tax Validation in failed.

Tax validation scenarios

Scenario	Description
Tax validation successful	If tax response is successful, the tax validation page will display the tax lines (Review compliance - tax validation lane) created automatically from the tax response.
Tax not validated due to integration error	Tax validation fails, exception is raised. **Note:** The revalidate Timed#Out Tax Validations scheduled job identifies invoices that have remained in the In Progress tax status beyond the configured threshold (as defined by the system property Maximum time to wait for tax validation from the external tax integration in minutes) and updates their tax status to **Integration Error**.
Tax validation failed	Tax validation cannot be completed due to missing required invoice attributes for tax calculation or If tax response fails then Tax validation failed exception is raised. AP specialist manually verifies the invoice and selects **Validate tax** to re-calculate the tax.
Tax validation expired	Invoice header or line-level information is changed after the invoice execution (post tax integration response) then Tax validation expired exception is raised. AP specialist manually verifies the invoice and selects **Validate tax** to re-calculate the tax.
System validates the supplier taxes by comparing the taxes calculated from the external tax engine and creates over or under tax exceptions.	

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Scenario	Description
Under tax amount variance (invoice line)	Tax amount on an invoice line is lesser than the tax response (considering the variance) received for the line item through tax engine.
Under tax amount variance (invoice header) exception	Total tax amount on the invoice header is lesser than the total tax (considering the variance) for the invoice received through tax engine
Over tax amount variance (invoice header)	Total tax amount on the invoice header is greater than the total tax (considering the variance) of the invoice received through tax engine
Over tax amount variance (invoice line)	Tax amount on the invoice line is greater than the tax (considering the variance) of the invoice line item of the invoice received through tax engine

6. Select **Review exceptions**.
   The list of exceptions raised for the invoice is listed. For more information on exceptions, see Invoice exceptions and Using Playbook in Accounts Payable Operations.
   The invoice tax validation is successful.

Accounts Payable Operations reference

Reference topics provide additional information about the lists and forms that you use in Accounts Payable Operations.

Accounts Payable Operations properties

On the Accounts Payable Operations properties form, you can set the parameters that control the invoice line mapping, invoice ingestion for API and exception management.

Accounts Payable Operations properties as an admin

Property	Description	Role
Invoice line-mapping properties		Admin
Enable rules-based engine for invoice line mapping? (Default:Yes) [sn_ap_apm.mapping.enable_rule_based_mapping]	Select the property if you want the rule-based engine to perform the mapping of invoice line with the purchase order line. Deselect the property, if you don't want the rules-based engine to perform the invoice line mapping. For more information on invoice line mapping with purchase order line, see Rules based engine.	
Review invoice line mappings predicted by rules-based engine? (Default:No) [sn_ap_apm.mapping.review_rule_based_mapping_suggestions]	By default, the property is deselected, and does not allow the AP specialist to review the mapping results generated by rules based engine. Select the property if you want the AP specialist to	

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Accounts Payable Operations properties as an admin (continued)

Property	Description	Role
	manually review the mapping results generated by rules based engine, confirm the mapping and change the state to mapping complete.	
Review invoice line mappings predicted by Now Assist? (Default:Yes)	By default, the property is selected and allows the AP specialist to review the mapping results generated by Now Assist. After reviewing the mapping results, AP specialist confirms the mapping and changes the state to mapping complete. Deselect the property if you don't want the AP specialist to review the invoice line-mapping results generated by Now Assist.	
Invoice ingestion API Properties		
Maximum number of invoices according to batch in accounts payable invoice create API [sn_spend_intg.ap.invoice.create.api.record_limit]	Maximum number of invoices that can be processed in a batch using accounts payable invoice create API. Default value is 100.	
Exception management properties		
Number of parallel worker threads for exception engine scheduler? [sn_ap_apm.exception.engine.exception_parallel_thread_count]	Defines the number of parallel threads used by the exception engine scheduler to process invoice exceptions. Default value is 4.	
Wait time (minutes) before exception engine scheduler rechecks an invoice for exceptions [sn_ap_apm.exception.engine.scheduler_cool_off_period]	Defines the time interval in minutes after which the invoice is picked for processing. Default value is 240.	
Formatter fields for invoice exception activity [glide.ui.sn_ap_apm_exception_activity.fields]	Filter that lets you select which of the available fields to show in the invoice exception activity.	
Formatter fields for invoice exception line activity [glide.ui.sn_ap_apm_line_exception_activity.fields]	Filter that lets you select which of the available fields to show in the invoice line exception activity.	
Formatter fields for invoice tolerance rule activity [glide.ui.sn_ap_apm_invoice_tolerance_rules_activity.fields]	Filter that lets you select which of the available fields to show in the tolerance rules activity.	
Formatter fields for invoice tolerance type activity [glide.ui.sn_ap_apm_invoice_tolerance_type_activity.fields]	Filter that lets you select which of the available fields to show in the tolerance type activity.	

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Accounts Payable Operations properties as an AP admin

Property	Description	Role
Invoice line-mapping properties		AP admin
Enable rules-based engine for invoice line mapping? (Default:Yes) [sn_ap_apm.mapping.enable_rule_based_mapping]	Select the property if you want the rule-based engine to perform the mapping of invoice lines with purchase order lines. Deselect the property, if you don't want the rules-based engine to perform the invoice line mapping. For more information on invoice line mapping with purchase order line, see Rules based engine.	
Review invoice line mappings predicted by rules-based engine? (Default:No) [sn_ap_apm.mapping.review_rule_based_mapping_suggestions]	By default, the property is deselected, and does not allow the AP specialist to review the mapping suggestions generated by rules based engine. Select the property if you want the AP specialist to manually review the mapping results generated by rules based engine, confirm the mapping and change the state to mapping complete.	
Review invoice line mappings predicted by Now Assist? (Default:Yes)	By default, the property is selected and allows the AP specialist to review the mapping results generated by Now Assist. After reviewing the mapping results, AP specialist confirms the mapping and changes the state to mapping complete. Deselect the property if you don't want the AP specialist to review the invoice line-mapping results generated by Now Assist.	
Exception management properties		
Number of parallel worker threads for exception engine scheduler? [sn_ap_apm.exception.engine.max_parallel_threads]	Defines the number of parallel threads used by the exception engine scheduler to process invoice exceptions. Default value is 4.	
Wait time (minutes) before exception engine scheduler rechecks an	Defines the time interval in minutes after which the invoice is picked for	

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Accounts Payable Operations properties as an AP admin (continued)

Property	Description	Role
invoice for exceptions [sn_ap_apm.exception.engine.scheduler_cool_off_period]	processing. Default value is 240	

Accounts Payable Operations properties as an integrator

Property	Description	Role
Invoice ingestion API Properties		Integrator
Maximum number of invoices according to batch in accounts payable invoice create API [sn_spend_intg.ap.invoice.create.api.record_limit]	Maximum number of invoices that can be processed in a batch using accounts payable invoice create API. Default value is 100.	

Accounts Payable Operations properties as an AP admin

Property	Description
Tax management properties	
List of Invoice fields that, when modified, are eligible for triggering tax recalculation. (Ensure all fields provided are comma-separated and do not have spaces) [sn_ap_apm.invoice_attributes_for_tax_revalidation] supplier_invoice_number,invoice_date,supplier,legal_entity,subtotal,amount_invoiced_without_tax_transaction_	The mandatory invoice fields needed for tax engine to automatically trigger re-calculation when invoice data is modified.
Maximum time to wait for tax validation from the external tax integration (minutes) [sn_ap_apm.maximum_wait_time_for_tax_validation]	The maximum time in seconds that Accounts Payable Operations will wait for a response from tax engine while performing tax validation on an invoice.
Enable integration with external tax system[sn_ap_apm.enable_integration_with_external_tax_system]	Controls whether invoices are sent to external tax engine for automated tax validation. Default value is Yes.
List of Invoice line fields that, when modified, are eligible for triggering tax recalculation. (Ensure all fields provided are comma-separated and do not have spaces) [sn_ap_apm.invoice_line_attributes-for-tax-revalidation] sub_total,line_description	Determines which line-level field changes are significant enough to require re-sending the invoice line data to tax engine for fresh tax calculation.
Number of invoices processed in parallel [sn_ap_apm.external_tax.scheduler.parallel_worker_threads]	Defines the number of parallel worker threads that the tax validation scheduler uses to process invoice tax validations concurrently when sending requests to the external tax engine.

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Accounts Payable Operations properties as an AP admin (continued)

Property	Description
Time to wait before revalidating tax on an invoice (minutes) [sn_ap_apm.external_tax.scheduler_cool_off_period]	Defines the waiting period (in seconds) between consecutive executions of the tax validation scheduler job. Default value is 60.
Maximum number of invoices sent per batch [sn_ap_apm.external_tax_max_invoices_per_batch]	Maximum number of invoices that can be sent to the external tax engine in a single batch request during tax validation processing. Default value is 1000.

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	A description of the goods or services represented by the invoice line item.
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	The SWIFT or BIC code for international wire transfers to the supplier's bank.
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.

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Create New Invoice Line form (continued)

Field	Description
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.
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.

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Create New Invoice form (continued)

Field	Description
ERP number	Unique number generated within the ERP system for the invoice. This field is applicable when there is an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration.
Short description	Brief description about the invoice.
Summary Details	
Supplier	Supplier who delivers the product or service.
Purchase order	Purchase order associated with this invoice. **Note:** For **Non-PO invoice** the purchase order is not made available.
Payment terms	How and when to make a payment for the products and services.
Subtotal	The total amount from all the invoice lines without tax and shipping charges.
Tax amount	Tax applied on the invoice amount.
Shipping	Shipping charges incurred for the invoice.
Other charges	Other charges applied on the invoice amount.
Discounts	The discount applied on the invoice amount.
Early payment discount amount	The discount applied on the total invoice amount on early payment.
Amount invoiced without tax (Transactional currency)	Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in transactional currency.
Amount invoiced (Transactional currency)	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency.
Dates	
Invoice date	Date on which this invoice is created.
Due date	Date by when you must make the payment.
ERP posting date	Date on which the invoice is posted in the ERP system.
Payment date	The date by when you must make the payment.
Accounting Details	
Legal entity	The internal legal entity which incurs the cost of this invoice.
Default tax code	The tax code levied on the total invoice amount.
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.

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Create New Invoice form (continued)

Field	Description
Remit to country	The country to which the payment is made.
Remit to city	The city to which the payment is made.
Remit to zip/postal code	The zip code to which this payment is made.
Remit to state/province	The state to which the payment is made.
Bill to street	The street address to which the invoice is sent.
Bill to country	The country to which the invoice is sent.
Bill to city	The city to which the invoice is sent.
Bill to zip/postal code	The zip code to which the invoice is sent.
Bill to state/province	The state to which the invoice is sent.
Ship to street	The street address to which the items on the purchase order should be shipped.
Ship to country	The country to which the items on the purchase order should be shipped.
Ship to city	The city to which the items on the purchase order should be shipped.
Ship to zip/postal code	The zip code to which the items on the purchase order should be shipped.
Ship to state/province	The state to which the items on the purchase order should be shipped.

Invoice 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.

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Inbound Invoice Fields

The Inbound invoice table is the source table from where you import the invoice required fields to successfully create an invoice through the integration framework.

Invoice Imports

Column	Description	Data type
Invoice Type (Mandatory)	Details about the invoice.	Choice Examples: invoice/ non_ po_invoice, debit _memo, credit_memo
Supplier invoice number	The invoice number of the supplier and ERP source and ERP invoice number	String
Business owner	email of business the owner who owns the application from the business side	String
Supplier (Mandatory)	Name of the ERP supplier code	String
Purchase order	Binding contract between a buyer and a supplier that authorizes a purchasing transaction. Derived from ERP source and supplier	String
Invoice date (Mandatory)	The date on which the invoice is created.	String (yyyy-mm-dd)
Payment terms	Conditions applied on the payment term.	String
Legal entity	Stores Legal entity's ERP company code	String
Tax amount	Tax rate applied on the invoice amount	Decimal number
Shipping amount	Shipping charges incurred for the invoice	Decimal number
Subtotal (Mandatory)	Total amount of money to be paid to the supplier excluding tax and shipping charges.	Decimal number. Example 12345.65
Other charges	Additional charges incurred on the invoice	Decimal number
Discounts	Reduction on the total amount incurred on the invoice	Decimal number
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	Name of the third party application associated with the invoice.	String

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Invoice Imports (continued)

Column	Description	Data type
source (Mandatory)		

Inbound invoice line fields

The Inbound invoice line table is the source table from where you import the invoice line required fields to successfully create an invoice through the integration framework.

Invoice Imports

Column	Description	Data type
External invoice source (required)	Name of the third party application associated with the invoice. Derive logic from external invoice number.	String
Line description (required)	Description of the invoice line.	String
Purchase order line	Information of the individual lines under a purchase order and ERP PO line number.	String
Line quantity (required)	The number of items that have been invoiced	Decimal number
Line unit price (required)	Unit price of the line item in the invoice.	Decimal number
Payment terms	Conditions applied on the payment term.	String Example (Net 30)
Legal entity	Stores legal entity's ERP company code.	String
Tax amount	Tax rate applied on the invoice amount.	Decimal number
Subtotal (required)	Total amount of money to be paid to the supplier excluding tax and shipping charges.	Decimal number Example (12345.65)
Cost center	Combination of cost center's account number and ERP source.	String
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

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Inbound invoice payment fields

The Inbound invoice payment details needed for a supplier to complete the transaction.

Invoice Imports

Column	Description	Data type
Payment amount	Payment details about the invoice	Decimal number
ERP invoice number	The ERP invoice number of the supplier invoice	String
Payment date	The date on which the invoice payment was completed	String (yyy-mm-dd)
Payment method	Mode of payment	Choice Example: bank_transfer/ cash_payment/ cheque /credit_card / debit_card /wire_transfer
Payment reference ID	A unique ID to track the payment details	Alpha numeric
Remit to city	The city to which the payment is made	String
Remit to country	The country to which the payment is made in ISO 3166 format. Example:US	String
Remit to state/ province	The state or province to which the payment is made	String
Remit to street	The street address to which the payment is made	String
Remit to zip/postal code	The zip or postal code address to which the payment is made	String
Scheduled payment date	The date at which the payment will be made	String (yyyy-mm-dd)
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.

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Invoice Imports

Column	Description	Data type
Supplier invoice number	The combination of supplier invoice number or supplier and ERP source and ERP invoice number	String
Business owner.Email	Name of the owner who owns the application from the business side	String
Amount invoiced (Transaction currency).amount	Charges added to the invoice	String
Amount invoiced (Transaction currency).currency	Charges added to the invoice	String
Discounts.amount	Reduction on the total amount incurred on the invoice	String
Legal Entity.ERP Source.Source	Stores organizational entities defined in the application	String
Type	Details about the invoice	Choice
Supplier	Name of the supplier	Reference
Supplier invoice number	Invoice number mentioned by the supplier	String
Purchase order	Binding contract between a buyer and a supplier that authorizes a purchasing transaction	Reference
Invoice 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.

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Invoice Imports

Column	Description	Data type
Line description	Description of the invoice line	String
Purchase order line	Information of the individual lines under a purchase order line or a sourcing request for the referenced supplier	Reference
Invoice line quantity	The number of items that have been invoiced	String
Line unit price	Unit price of the line item in the invoice	String
Ledger account	Displays General Ledger Account	Reference
Tax amount.amount	Tax rate applied on the invoice amount	String
Subtotal.amount	Total amount of money to be paid to the supplier excluding tax and shipping charges.	String
Cost center	Represent business entity to which costs can be allocated	Reference
Status	Current state of the invoice	String
Invoice.Legal entity. ERP source	Stores organizational entities defined in the application	String
ERP line number	Displays the ERP number at the line item level	String
Invoice	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**.

Case exclusion reference fields

The Case Exclusion Rule table stores the rules that determine when Invoice Case Management ignores an inbound email instead of creating an invoice inquiry case. This reference describes the table, its fields, and who can manage it.

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Case exclusion rules are stored in the Case Exclusion Rule table (`sn_spend_sdc_case_exclusion_rule`), which is built on the Common Service Delivery application by extending the S2P Custom Configuration table (`sn_fin_s2p_custom_config`). Rule records use the **Case Exclusion Rule Config** configuration type.

Case Exclusion Rule table fields

Case Exclusion Rule table fields

Field	Description	Type
Rule ID	Unique identifier generated automatically for each rule.	Auto-updated
Name	Name of the case exclusion rule.	String
Rule Applies To	Case type that the rule applies to. Currently, **Invoice Inquiry Case**.	Choice
Order	Controls the execution precedence of rules, from lowest to highest number.	Integer
Active	Indicates whether the rule is in effect.	True/False
Conditions	Condition builder that defines which inbound emails the rule matches. Available fields are Body Text, Keywords, Recipients, Subject, User, and User ID.	Conditions

Create invoice cost allocation form

Allocate invoice line cost across multiple cost centers.

Create invoice cost allocation form

Field	Description
Invoice cost allocation tab	Select the following fields.
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

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Create invoice cost allocation form (continued)

Field	Description
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.
Integration status	Choice	Status of the integration process.

Distribution set form

Create a distribution set to split cost allocations automatically for invoice lines.

Distribution set form

Field	Description
Distribution set for cost allocation and ledger account	
Number	Auto-populated number of the distribution set.
Name	Unique name of the distribution set.
Template	You can choose to select the template if you want the AP specialist to apply the distribution set without entering percentage value.
Description	Short description of the distribution set that you want to apply.

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Distribution set form (continued)

Field	Description
Active	The check box is enabled if the percentage is allocated in the distribution set sums to 100 percent. By default, this is grayed out.
Order	Order in which the distribution set must be applied to the invoice line.
Effective from	Date from which the distribution set is active.
Effective to	Date by when the distribution set must be deactivated.
Filters	Conditions or rules that are configured. Example: Supplier tax is $ 100USD.
Distribution Lines	
Distribution set	Auto-populated number of the distribution set.
Allocation type	Cost split across allocation type cost center or general ledger.
Cost center	Cost center for which the distribution set is applied.
Allocation percentage	Percentage cost that is split across cost centers.

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.

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Create New Invoice case form (continued)

Field	Description
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** • **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.

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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: • 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.

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Invoice statuses (continued)

Invoice status	Description
Rejected	When an invoice is rejected through email, custom APIs, the invoice status is updated as rejected.
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**.
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

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Create New Invoice task form (continued)

Field	Description
Assignment group	Group that you want to assign this task to.
Assigned to	Person that you want to assign this task to.
Short description	Brief description about the task.
Description	Detailed description about the task.

Invoice task form tabs

The Invoice task form includes tabs that store invoice task information that an Accounts Payable Specialist can use to perform related tasks.

Invoice task form tabs

Tab	Description
Details	Details about the task.
Invoice exception lines	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**.

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Invoice processing case form (continued)

Field	Description
Payment terms	How and when to make payment for the products and services.
Subtotal	The total amount from all the invoice lines without tax and shipping charges.
Tax amount	Tax applied on the invoice amount.
Shipping	Shipping charges incurred for the invoice.
Other charges	Other charges applied on the invoice amount.
Discounts	The discount applied on the invoice amount.
Amount invoiced (Transactional currency)	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency.
Dates	
Invoice date	Date on which this invoice is created.
Due date	Date by when you must make the payment.
Accounting	
Legal entity	The internal legal entity which incurs the cost of this invoice.
Default tax code	The tax code levied on the total invoice amount.
Default tax jurisdiction code	The tax code jurisdiction to which you must pay the tax.
Addresses	
Remit to street	The street address to which the payment is made.
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.

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Invoice processing case form (continued)

Field	Description
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 `sn_apm_invoice_attribute` table.

Invoice attributes form

Tab	Description
Approval date	The date, in DD/MM/YYYY format, on which an invoice was approved for payment, either automatically or manually.
Auto approved	Indicates whether the invoice was automatically approved by the system without manual review.
Created	The date and time the invoice was 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 otherwise it is set to false.
Extraction failed	Indicates whether the automated invoice data extraction process encountered errors.
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	Indicates whether the invoice was manually submitted by an Accounts Payable specialist instead of through an automated process.
Matching error	Indicates whether the invoice encountered the **PO matching error** state.
Rejected	Indicates that the invoice or line has been rejected and will not be processed for payment.
Suspected duplicate	Indicates whether the invoice is suspected to be a duplicate of another invoice in the system. The value is set to true for invoices that run into the **Suspected duplicate** state, otherwise, it is false.
Sys_id	Unique ID of the invoice processing detail record.
Tags	Invoice processing detail-related tags.
Tolerance applied	Indicates whether tolerance rules were applied so the invoice can proceed despite variances.

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Invoice attributes form (continued)

Tab	Description
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.
Exceptions	Exceptions that are identified on the invoice.
Purchase order lines	Purchase order lines of the purchase order for which the invoice has been raised. This tab is shown only for invoices of type **PO Invoice**.
Tasks	Tasks that have been created for this case by the Accounts Payable Specialist.
Potential duplicate invoices	Invoices that may be a duplicate of the invoice currently associated with this case.
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.

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ERP Posting error form tabs (continued)

Tab	Description
	• 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 explanation 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

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.

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List of invoice and invoice line fields included in the use case (continued)

Field	Description
Other charges	Other charges applied on the invoice amount.
Tax amount	Tax applied on the invoice amount.
Invoice currency	The currency mentioned in the invoice.
Bill to company name	The name of the company to which the invoice is billed.
Bill to city	The city to which the invoice is sent.
Bill to country	The country to which the invoice is sent.
Bill to state/province	The state to which the invoice is sent.
Bill to street	The street address to which the invoice is sent.
Bill to zip/postal code	The zip code to which the invoice is sent.
Remit to city	The city to which the payment is made.
Remit to country	The country to which the payment is made.
Remit to state/ province	The state to which the payment is made.
Remit to street	The street address to which the payment is made.
Remit to zip/postal code	The zip code to which this payment is made.
Invoice ship to city	The city to which the items on the purchase order should be shipped.
Invoice ship to country	The country to which the items on the purchase order should be shipped.
Invoice ship to state/ province	The state to which the items on the purchase order should be shipped.
Invoice ship to street	The street address to which the items on the purchase order should be shipped.
Invoice ship to zip/ postal code	The zip code to which the items on the purchase order should be shipped.
Invoice Line Fields	
Line amount	Total amount for the invoice line item.
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.

Tax lines

The Tax lines tab lists the tax line associated with the invoice line.

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Tax lines tab

The following table displays the fields in the tax lines tab.

Tax line fields

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.
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.

Invoice tax line fields

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.

Tax status

The tax status field in the invoice record is used to track the current status of tax validation processing throughout the tax integration workflow.

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Invoice tax status fields

The following table displays the tax status [tax_status] fields in the invoice record [sn_shop_invoice]:

Invoice tax status fields

Field	Description
Invoice table	
In progress	Tax calculation request sent to third party tax engine and awaiting response.
Failed	Tax calculation failed due to tax engine integration failure.
Success	Tax calculation completed and tax lines created successfully.
Integration error	Tax engine connectivity or communication failure occurred.
Recalculate tax	Invoice header or invoice line needs field changes, invoice tax status changes to recalculate tax. The invoice is sent for tax revalidation manually or through scheduler.

For more information on using tax status, see Tax Engine Integration.

Tax integration field map fields

Field descriptions for the Tax integration field mappings [sn_spend_intg_tax_field_map] table, which defines the outbound and inbound mappings that transform invoice data between APO and a tax engine.

Tax integration field map fields

The Tax integration field mappings [sn_spend_intg_tax_field_map] table drives the transformation of invoice data between APO and the tax engine. Mappings are maintained as configuration rather than script. The following table describes the fields.

Tax integration field map fields

Field	Description
Type	Direction of the mapping. Set to **outbound** for the request that is sent from APO to the tax engine, or **inbound** for the response that is returned from the tax engine.
Transaction type	Transaction type that the mapping applies to, such as invoice tax verification.
Source table	Table that the source data is read from.
Source field	Field that the value is read from on the source table.
Target field	Field that the value is written to in the target payload.
Target entity	Entity in the target payload that the target field belongs to.
Target tax engine	Tax engine that the mapping applies to, such as Vertex.
Mapping type	Vertex's tax response is converted back as JSON format into internal staging record.
Version	Version of the mapping set.

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Tax integration field map fields (continued)

Field	Description
Order	Order in which the mapping is applied.
Active	Status of the mapping. The transformation uses active mappings only and excludes inactive mappings and mappings for a different tax engine.

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 overriding an invoice exception and allowing the invoice to proceed.
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.

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Invoice exception form tabs (continued)

Tab	Description
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. **Note:** This tab is shown only for an Insufficient Goods Receipt (IGR) exception.

Invoice exception rule form

Reference information for Invoice Exception Rules in Accounts Payable Operations. Use this topic to understand each form field and its configuration options.

Invoice exception rules define the conditions under which invoices are flagged as exceptions in Accounts Payable Operations. Each rule specifies the exception type, triggering conditions, handling behavior, and processing order. The form fields control rule activation, resolution workflow, and exception prioritization.

Form field definitions

The following table describes each field in the invoice exception rule for.

Invoice exception rule form fields

Field	Description
Active	Controls whether the rule is enabled. When selected, the rule is active and exceptions are triggered. When cleared, the rule is inactive and invoices aren't flagged by this rule.

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Invoice exception rule form fields (continued)

Field	Description
Allow bypass	When selected, authorized users can bypass this exception and proceed with invoice processing without triggering the exception.
Rejection mode	Controls how exceptions from this rule are resolved. Options: "Manual" or "None".
Base object	This field determines which records are evaluated against the rule conditions. sn_shop_invoice is the table name shown in the condition builder. Header level exception will be set to [sn_shop_invoice] table and for line level it will be set to [sn_shop_invoice_line] table.
Condition	Defines the logical criteria that trigger the exception.
Condition field selector	A drop-down showing available invoice fields. Select a field to include in the condition criteria.
Condition operator	Logical operators for field comparison.
Condition value	The comparison value for the condition.
Condition logic (AND / OR)	Logical operators joining multiple conditions.
New Criteria button	Adds an additional condition row to the rule, allowing complex multi-field matching criteria.
Order	A numeric value that controls the sequence in which rules are evaluated.

Request Help form

Suppliers use the **Request Help** form to report an inquiry related issue or request.

Request Help form

Field	Description
Invoice Exception	
Supplier	Auto-populated name of the logged in supplier.
How would you summarize your issue?	Summary of the issue or request.
Anything else we should know?	Additional information about the issue. **Note:** Select the **Issue contains sensitive or confidential information** check box. For more information on handling sensitive information, see Universal Request sensitive information security.
Add attachments	Attachments related to the request or issue.

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Data required for invoice processing

Reference information for the key tables and required data used to process invoices in Accounts Payable Operations.

Data required for invoice processing

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.

Summary details

Field	Data type	Description
Supplier	Reference	Supplier who provides the product of this order.

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Summary details (continued)

Field	Data type	Description
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.

sn_shop_purchase_order_line table fields

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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sn_shop_purchase_order_line table fields (continued)

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.

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sn_shop_purchase_order_line table fields (continued)

Field	Data type	Description
Recipient	Reference	The person to whom goods or services are being delivered.
Address		Street address where goods will be shipped or where services will be provided.
City		City where goods will be shipped or where the services are provided.
State or Province		State or Province where goods will be shipped or where the services are provided.
Country		Country where goods will be shipped or where the services are provided.
Zip or Postal code		Zip or Postal code where goods will be shipped or where the services are provided.
General Ledger Account		The account to which capital or operational expenses will be posted.

Supplier

You can add a supplier to the primary data and add products related to that supplier. The supplier data is managed effortlessly and enhance productivity of the teams that engage with suppliers.

sn_fin_supplier table

You can add suppliers and their products to populate your primary data. For more information on supplier. see Manage supplier details.

sn_fin_supplier table fields

Field	Data type	Description
Legal name	String	Legal name of the supplier that corresponds to its operating location.

Related topics

SLO landing page

Supplier Legal Entity Mapping

The linking of supplier registered legal entity to the customer's corresponding legal entity within APO is referred as Supplier legal entity mapping. Mapping ensures that invoices, purchase orders, and payments are correctly routed, validated, and processed across systems.

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Supplier Legal Entity Mapping table

Supplier Legal Entity Mapping fields

Field	Data type	Description
Supplier	Reference	Name of the supplier.
Legal entity	Reference	Legal entity of the customer.
Payment term	Reference	The name or code of the payment term. Example: Net 60.
General ledger account	Reference	The account to which capital or operational expenses will be posted.

Supplier contact

You can add the supplier contacts allowing them to access the#Supplier Collaboration Portal #and start working on the most important tasks. You can view information about the supplier contacts and also indicates which user is the primary contact.

vm_vdr_contact table

You can view the supplier contact details.

vm_vdr_contact table fields

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.

sn_fin_legal_entity table fields

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.

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sn_fin_legal_entity table fields (continued)

Field	Data type	Description
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.

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

Cost center fields

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.

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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.

sn_fin_gl account table fields

Field	Data type	Description
Account Name	String	Display name of the ledger account fetched from ERP.
Currency	Reference	Currency that the expense is valued in.
Ledger account	String	Ledger account code fetched from ERP. Example: 160020.

Payment terms

Specify the terms and conditions that apply to customers while paying for an invoice. These are usually imposed by suppliers during the purchase.

sn_shop_payment_term

You can view the payment terms referencing an invoice.

sn_shop_payment_term table fields

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.

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Tax code fields

The following table displays the fields in the tax code form.

Tax code fields

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.

Tax type fields

The following table displays the fields in the tax code form.

Tax type fields

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.

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Organization tax table fields

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.

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.

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Invoice exception definition form (continued)

Field	Description
	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.
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: • 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.

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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.
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>.

Jurisdictions main table

The reference [sn_fin_jurisdiction] table that the Jurisdiction field on the invoice tax line points to.

Jurisdictions main table fields

The reference [sn_fin_jurisdiction] table holds the set of taxing jurisdictions that the tax integration matches against. Each jurisdiction's type and authority are defined once and reused on every tax line. The following table describes the fields.

Jurisdictions main table fields

Field	Description
Jurisdiction code	Unique code that identifies the jurisdiction and serves as its reference key (example, SANTA_CLARA).

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Jurisdictions main table fields (continued)

Field	Description
Jurisdiction name	Descriptive name of the jurisdiction (example, "SANTA CLARA COUNTY TUT 2026 (D22).
Jurisdiction type	Level or category of the jurisdiction.
Tax authority	Taxing authority or levy associated with the jurisdiction (example, Local Sales and Use Tax).

Accounts Payable Operations glossary

Learn about the terms and concepts used in Accounts Payable Operations (APO).

Glossary terms are grouped alphabetically.

A | B| C| D | E | G | I | L | N | O | P | R | S | T | U | V | W

A

account number

The supplier's bank account number for payment processing. Displayed when capturing invoice details from documents.

Accounts Payable

The process of managing and paying invoices from suppliers.

Accounts payable agent

User role (sn_ap_cm.agent) who handles inquiry cases from suppliers or employees in the Source-to-Pay workspace.

Accounts payable invoice processing

Application that identifies invoice duplicates, matches invoices to purchase orders and goods receipts, enables invoice approval management, and provides invoice exception management.

Accounts Payable Operations (APO)

A ServiceNow application that enables automated invoice processing, case management, and supplier inquiry handling from invoice ingestion to approval and payment.

Accounts Payable Operations Integration with Document Intelligence

Application (com.sn_ap_ic) that automatically captures data from incoming invoices using Document Intelligence capabilities to reduce manual data entry effort.

Accounts payable specialist

User role (sn_ap_apm.accounts_payable_specialist) who processes invoices, resolves exceptions, and manages invoice cases in the Source-to-Pay workspace.

ACH Routing Number

The Automated Clearing House routing number used for electronic payment transfers to suppliers. Captured during invoice ingestion.

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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

A suite of tools that provides agents, case managers, help desk professionals, and managers quick access to what they need to help answer customer questions and resolve customer problems.This is the unified interface where accounts payable teams manage their day-to-day operations.

AI agents

AI agents are autonomous digital workers that use LLMs, tools, and workflows to complete tasks across ITSM, HR, and CSM on behalf of users. They can reason, plan, and act independently or collaboratively. You can create and manage them using AI Agent Studio and orchestrate them in AI Agent Orchestrator. These agents are embedded in ServiceNow Otto panels, Virtual Agent, and custom workflows.

The AI agent is a virtual worker that performs specific tasks leveraging tools from the ServiceNow AI Platform such as workflow, skill, script, knowledge base, etc.

Assignment rules

Guidelines that determine how work items are assigned.

AR invoice

An Accounts Receivable invoice record representing amounts owed by customers. Also referred to as "Invoice" in the system.

AR invoice line

Individual line items within an accounts receivable invoice, representing specific goods or services billed.

Awaiting Internal Info

A case state indicating that resolution is pending because additional information is needed from internal teams.

Awaiting Requester Info

A case state indicating that the case is waiting for additional information from the person who submitted the inquiry.

B

Business owner

Individual responsible for approving invoice or managing exceptions; must be valid and active, matching purchase order if invoice is PO type.

C

case

A record that is used to track and manage a specific customer issue, request, or incident. It is commonly used in resolving issues through customer support and helpdesk systems.

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Credit memo

Invoice type issued when there is a reduction or offset in amount payable to supplier; can be PO or Non-PO type and must contain original invoice, original invoice number, or purchase order reference.

cost allocation

Process of identifying and allocating invoice line costs across different cost centers or ledger accounts for accurate cost analysis and invoice processing.

cost center

Business unit or department to which invoice costs are allocated; used in cost allocation records for expense tracking and reporting.

cXML

Commerce XML- one of the supported formats for invoice ingestion via API.

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.

distribution lines

Individual allocation records within a distribution set that specify percentages or amounts to distribute across cost centers or general ledger accounts.

distribution set

Collection of predefined rules and templates designed to automate cost allocation for invoice lines across cost centers and GL accounts, eliminating manual cost splitting.

Duplicate invoice detection

Automated process that identifies invoices that may have already been submitted to prevent the same invoice from being paid twice.

E

Enterprise resource planning systems

Enterprise resource planning (ERP) systems used for managing business processes.

ERP

Enterprise Resource Planning - external system integrated with APO for invoice posting and payment processing.

ERP integration framework

Framework enabling APO to post invoices to external ERP systems and track integration errors when posting fails due to data issues or connectivity problems.

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ERP Source

External ERP system reference that ensures consistent data sourcing for invoice fields like purchase order, legal entity, supplier to prevent integration errors.

Exception engine

Automated system component that identifies discrepancies in invoices during processing and creates invoice exception records for review and resolution.

Exception management

Handling and resolving issues that arise during Accounts Payable Operations invoice processing.

Exception monitoring job

Scheduled job running every five minutes, by default, to automatically check invoices for exceptions; can be activated or run manually.

Exception task

Task created to resolve specific invoice exceptions; can be auto-created by the system (for example, receipt tasks) or manually created by Accounts Payable Specialists.

Extraction confidence

Confidence level score assigned by Document Intelligence when extracting data from invoice documents; determines if manual review is required.

G

GL

Acronym for General Ledger.

I

Inbound staging tables in APO

Temporary tables that store invoice data received from external systems before transformation and creation of primary invoice records in APO.

Inquiry case

Case type submitted by employees or suppliers for invoice-related questions, including payment inquiry, invoice inquiry, expedite payment request, payment terms issues, and invoice entry assistance.

Integration error

System-generated error task recording integration issues when invoices fail to post to ERP systems due to poor connectivity, missing data, or system timeouts.

Interaction record

Auto-generated record logging any supplier or employee request for assistance via email, chat, or phone; can be associated with existing cases or used to create new cases.

Invoice approval

The process of verifying and authorizing an invoice for payment.

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Invoice automation

Case category for automated invoice processing cases created when invoices are ingested through Document Intelligence or API.

Invoice case

Case record created to manage invoice-related inquiries or processing activities, with categories including Inquiry and Invoice automation.

Invoice exception

Issues identified during invoice processing that require resolution.

Invoice ingestion

The process of receiving and entering invoices into the system.

Invoice ingestion API

Application programming interface that enables bulk AP invoice ingestion from external systems (supplier billing, buyer networks, OCR solutions) supporting cXML, JSON, and XML formats.

Invoice line

Individual line item on an invoice representing specific goods or services purchased; includes quantity, unit price, amount, and cost allocation details.

Invoice line mapping

Process of matching invoice lines with corresponding purchase order lines using rules-based engine or Now Assist for automated or AI-assisted mapping.

Invoice processing

The end-to-end handling of invoices from receipt to payment.

Invoice processing case

Case with category "Invoice automation" and subcategory "Invoice processing" created when invoices are ingested; tracks invoice through complete processing life cycle.

Invoice table restructuring in APO

Architectural change where invoice table (sn_shop_invoice) extends base invoice table (sn_fin_base_invoice) for improved data structure and extensibility.

ITAM

Acronym for IT Asset Management.

ITAM Integration

Integration between IT Asset Management and APO that enhances exception handling for ITAM-driven purchase order invoices by validating received quantities against receiving slips.

L

Ledger account

Financial account to which invoice costs are posted; used in cost allocation to distribute expenses across different accounting categories.

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Legal entity

Required field on invoices representing the business entity responsible for payment; used in supplier legal entity mapping and ERP source determination.

N

Natural Language Understanding (NLU)

AI capability integrated with virtual agent chatbot to help suppliers analyze, understand, and navigate to appropriate topics for invoice and inquiry-related queries.

NLU

Acronym for Natural Language Understanding.

Non-PO invoice

Invoice submitted without reference to a purchase order; requires manual coding and validation of supplier, legal entity, and cost allocation details.

O

Optical Character Recognition (OCR)

A technology that converts scanned contract documents or PDFs into searchable and editable text within ServiceNow.

Outbound Staging Table in APO

Table where approved invoices are posted before transmission to external ERP systems for payment processing.

P

Playbook

Visual workflow representation showing step-by-step invoice processing stages including validation, duplicate checking, matching, exception validation, approval, and payment processing.

PO invoice

Invoice created against a purchase order; undergoes PO matching to verify quantities, prices, and amounts against the original purchase order.

PO matching

Process of comparing invoice header and line details with corresponding purchase order information to identify discrepancies before approval.

PSM

Acronym for Procurement Service Management.

Purchase order

A document issued by a buyer to a seller, detailing the items or services to be purchased.

R

Receipt task

Task created by APO when Insufficient Goods Receipt exception occurs and PSM is installed; assigned to recipient on PO line for goods receipt confirmation.

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Receiving slip

Document generated in ITAM when goods receipt is completed; used to validate received quantities during invoice processing for ITAM-driven purchase orders.

Rules-based engine

Automated system that maps invoice lines with purchase order lines using fields like unit price, delivered unit price, exact description, exact amount, and amount round off.

S

Staging Tables

Temporary database tables storing invoice data during ingestion and transformation process before creation of final invoice records; includes inbound and outbound tables.

Supplier

Vendor or service provider submitting invoices for payment; must be validated and mapped to legal entity in Supplier Legal Entity Mapping table.

Supplier collaboration portal

Portal application enabling suppliers to check invoice status, create inquiry cases, submit new invoices, resolve tasks, and interact with AP specialists through chat and virtual agents.

Supplier Legal Entity Mapping

Table (sn_fin_supplier_detail) storing relationships between suppliers and legal entities, including hold payment and hold posting attributes that can trigger invoice exceptions.

supplier management

The process of managing relationships and transactions with suppliers.

Supplier tax

Tax amount provided by the supplier on the invoice; compared against system-calculated tax to identify over/under tax variances.

Source-to-Pay Workspace

Workspace where Accounts Payable specialists and admins create cases, manage invoices, resolve exceptions, and manage integrations with other applications.

System tax

Tax amount calculated by APO system based on tax type and invoice line amount; compared against supplier tax for validation.

T

Tax calculation

Process of computing final tax for invoices based on tax type (indirect tax or withholding tax) and comparing supplier-provided tax against system-calculated tax.

Tax line

Individual tax record added to invoice line specifying tax type, supplier tax amount, system tax amount, and final tax amount after variance resolution.

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Tax type

Classification of tax as either indirect tax (added to invoice amount) or withholding tax (subtracted from invoice amount) for proper tax calculation.

Tolerance type

Specific type of tolerance including Line amount tolerance, Line quantity tolerance, Line unit price tolerance, Overbilling amount tolerance, and Over/Under tax amount variance.

tolerance rules

A limit that is set on invoices to determine acceptable variances before they require further review.

Transformation process

Document Intelligence process that imports invoice data from staging tables, validates required fields, and creates invoice records in Draft state.

U

Universal request

Centralized entry point for invoice owners, suppliers, and customers to submit general case requests, simplifying the process of raising inquiries through Employee Center or Supplier Portal.

UR

Acronym for Universal Request.

V

virtual agent

An AI-driven assistant for handling common requests and inquiries.

Virtual agent flows

Predefined chatbot conversation topics including Check invoice status, Live agent support, Check inquiry status, Create new inquiry, and Prechat survey.

W

workflow

Automated process flow managing invoice progression through various stages from ingestion, validation, matching, exception handling, approval to payment.

work item

Task or interaction record representing customer requests that need assignment and processing; routed through Advanced Work Assignment queues.

Work item queue

A storage area for work items waiting to be assigned to agents.

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