

PUBLIC

Custom Joule Skill & Agent in SAP Build Customer Overdue Balance

Configuration & User Guide

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Overview

This document is meant for the Intelligent Collections Management / Customer Ageing scenario and follows the configuration guide template structure provided for another Joule-based solution. It explains the end-to-end setup required to make the Collections Management Agent run in SAP Build with SAP S/4HANA backend integration.

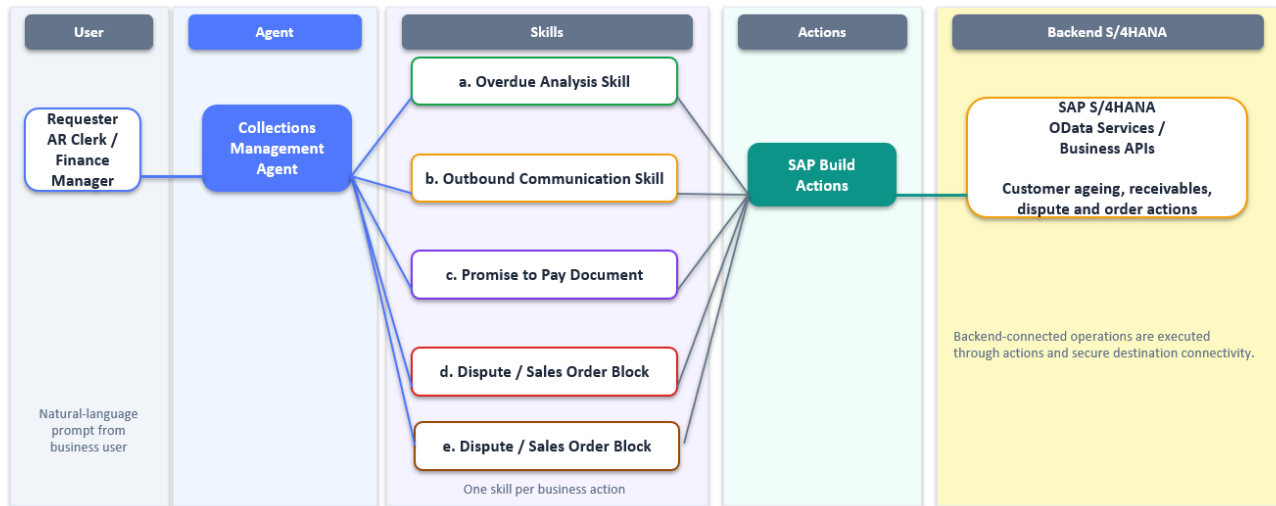
The main audience of this document includes technical administrators, SAP Build developers, functional experts in Finance / Order-to-Cash, and business users responsible for collections management.

Agent Functionality Overview

- The Collections Management Agent is a Joule-based AI agent built using SAP Build and Joule capabilities on SAP Business Technology Platform.
 - It enables users to analyze overdue customer receivables, trigger collection communications, interpret customer responses, and support follow-up actions such as promise-to-pay recording, sales order blocking, and dispute case initiation.
 - The agent integrates with SAP S/4HANA backend services using Joule Skills, which internally invoke SAP Build Actions and SAP S/4HANA OData APIs.
1. The final result is presented to the requester in a structured and readable format indicating the identified overdue exposure and the next business action to be considered.

Solution flow (example given below) :

Collections Management Agent Solution Flow



The following steps describe the highlevel solution flow of the Collection Agent:

1. The requester (for example, an Accounts Receivable Clerk or Finance Manager) submits a natural-language request to the Collections Management Agent, such as identifying overdue customers or sending a reminder communication.
2. The agent interprets the request and identifies the appropriate Joule Skills configured as tools based on the instructions defined in the agent design.
3. The Overdue Analysis skill invokes SAP Build Actions connected to SAP S/4HANA OData services to retrieve ageing and receivables data.
4. The Communication and Follow-up skills support outbound reminders, inbound response interpretation, promise-to-pay documentation, dispute initiation, and sales order blocking scenarios based on policy.

Business Value & Benefits

- Reduces manual effort in collections management by replacing mailbox-based and report-driven follow-up tasks with AI-assisted workflows.
- Improves response time for collection activities through natural-language access to overdue analysis and follow-up actions.
- Helps identify late payments, disputes, and potential defaults earlier in the process.
- Supports governed and auditable execution of collection-related actions through controlled backend integrations.

- Enables better cash-flow visibility and contributes to improved receivables governance, DSO monitoring, and customer risk management.
- Provides a scalable agentic automation foundation for Order-to-Cash and collections processes.

Prerequisites

For this template to run successfully, the following prerequisites are required:

- SAP Build with Joule capabilities enabled in the target tenant.
- SAP Business Technology Platform subaccount with destination configuration permissions and relevant entitlements for SAP Build, Joule, and action execution.
- SAP S/4HANA system with the required collections / customer ageing OData APIs exposed and tested.
- Appropriate authorizations for customer receivables, collections management, dispute processing, and related finance functions.
- Technical communication setup and network connectivity aligned with enterprise security standards.

Configuration Guide

Setup Business Technology Platform Cockpit

- Ensure the required entitlements are assigned to the target SAP BTP subaccount.
- Assign relevant role collections for SAP Build, Joule, destination administration, and action execution.
- Verify trust and identity configuration (for example IAS / corporate identity provider) where applicable.
- Confirm administrators can access SAP Build, destinations, tenant configuration, and environment management.

Configure SAP S/4HANA Destination

- To access the process automation capability of SAP Build, create the following destination in the SAP BTP cockpit:

Destination Property	Value
Name	<Destination Name>
Type	HTTP
URL	
Proxy Type	OnPremise
Authentication	BasicAuthentication

- Add the additional property:

Parameter	Value
HTML5.DynamicDestination	true
WebIDEEnabled	false
HTML5.Timeout	6000
sap.applicationdevelopment.actions.enabled	true
sap.processautomation.enabled	true

User Roles Configuration

To access this solution, users must be assigned the required SAP Build, Joule, and backend business role collections applicable to the collections scenario.

- SAP BTP Administrator roles for entitlements, destinations, trust, and environment setup.
- SAP Build developer / designer roles for actions, skills, and project maintenance.
- Joule / AI administrator roles for agent configuration, release, and deployment.
- Business user roles for collections management, customer line-item access, dispute case processing, and sales order / credit-related follow-up where needed.

Services used:

The following **Action Projects** are used in this template:

Action Project Name	Service Used	Purpose
Overdue Analysis Actions	SAP S/4HANA OData APIs	Analyze customer overdue balances and ageing data
Outbound Communication Actions	SAP Build / backend communication integration	Send reminders to customers for overdue receivables

Artifacts in the Agent:

Type	Name	Description
Joule Skill	Get Customer Overdue Details	Retrieves overdue amounts and key receivables data for customers
Joule Skill	Send Collection Reminder	Triggers outgoing communication to customers for overdue balances
Joule Skill	Get App	Open Ageing Analysis App

Setup Content Package

Import Custom Joule Agent

This template can be downloaded from the SAP Build Store:

1. Navigate to the **Store** option in your SAP Build Lobby.
2. Select the **Project Type** filter as “Joule Agent and Skill”
3. In the Search bar type “Customer Overdue Balance Agent”
4. Select the “Create from Template” button to add the template into your lobby.
5. Once the creation is complete, navigate to the Lobby to find the “Customer Overdue Balance Agent” project is available for use.

Configuration & Modification

- Once the Joule Skill and Agent project is added to the Lobby, it will be required to modify to consider the dispute reasons and other org specific attributes.
- Optional modifications include:
 - Updating agent instructions
 - Adding or modifying Joule Skills
 - Extending security validation logic
 - Customizing response formats

Release and Deploy the Project

Once the agent is verified by the user / modified based on user need, it has to be released and deployed into a shared environment.

- Refer to the link below to create/Share an Environment:
[Environments | SAP Help Portal](#)
- Refer to the link below to release a project:
[Release a Project | SAP Help Portal](#)
- Refer to the link below to deploy a project:
[Deploy a Project | SAP Help Portal](#)

Test the Joule Skills And Agent in SAP Build

1. To access your projects, navigate to **Control Tower ->Tenant Configuration->Environments**.

2. Select your environment.
 3. After deploying the project, the project should be seen in the Shared Environment.
 4. Click on the Tab, '**Joule**'
 5. Click on the button '**Launch**'
- This will open the Joule launchpad where you can key in the below prompts in order to test the agent.

Prompt	Expected Result
What are the top 10 overdue customers in company code 1010?	The agent returns the top overdue customers with ageing and amount information.
Analyze overdue balances for customer 1000001.	The agent returns customer details, overdue intervals, and recommended next action.
Send a reminder e-mail to the customer for invoices overdue by more than 30 days.	A reminder communication is triggered and a confirmation is returned to the user.

NOTE:

1: Currently the Agent will be only deployed in the SAP Build environment and hence testing can also be done only in the Build Lobby. If you want to **activate the Joule in other systems**

Eg: SAP S/4HANA or SAP Work zone, then click on the **settings** in 'Control Tower->Environments-><Your Shared Environment that was created>->Joule'

Here you have to switch the toggle on for '**Share Environment Capabilities**'.

Last Updated: Author: Members: Identifier: Description:

Projects Triggers Automation Launchers Agent Management Alert Handlers Variables API Keys Visibility Scenarios Processes and Workflows **Joule**

Joule Digital Assistant Shared

Launch



Environment Capabilities

Version

Joule Settings

Selecting this option deploys the environment's capabilities to Joule shared assistant, making them available to users who have "Execute" or "Administrator" rights for this environment.

Share Environment Capabilities

Apply Cancel