

PUBLIC

Custom Joule Skill & Agent in SAP Build Note Item (Down Payment) Document Action Agent

Configuration & User Guide

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Overview

This guide explains how to configure and deploy a Noted Item Creation Agent using SAP BTP, SAP Build / Joule Studio, Joule Skills, and a custom Joule Agent. The business scenario is the creation of a Down Payment Request as a noted item in SAP S/4HANA through natural-language interaction.

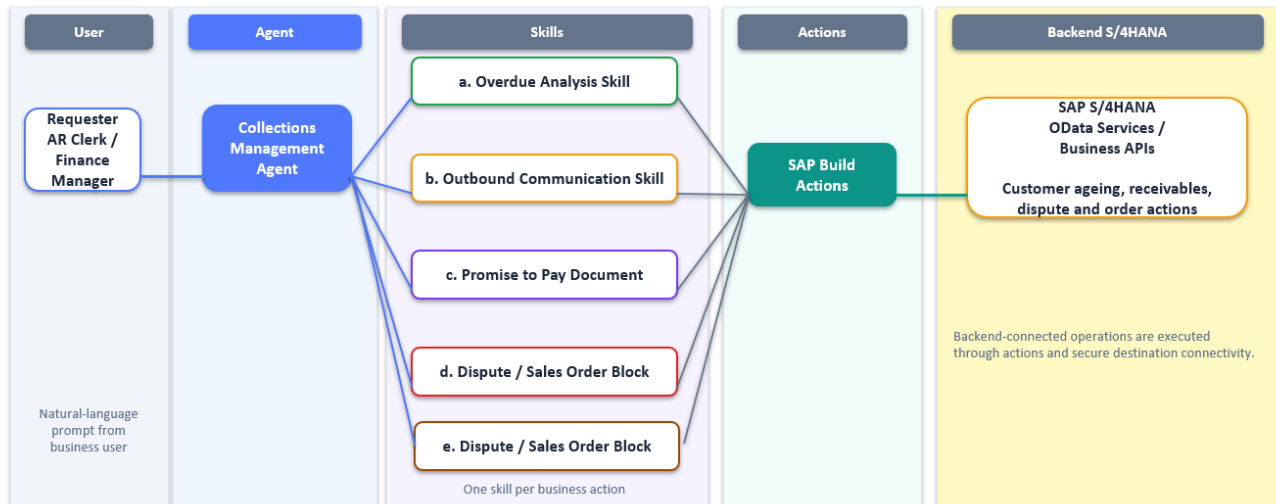
The solution follows the same layered pattern used in the uploaded Intelligent Collections material: SAP S/4HANA exposes the backend service, SAP Build Actions consume the service, Joule Skills wrap the actions, and the Joule Agent orchestrates those skills for business users.

- The agent receives a natural-language request to create a noted item / down payment request.
- Joule Skills trigger SAP Build Actions that call SAP S/4HANA services.
- The backend validates the input and creates the business object.

The agent returns the confirmation with business-meaningful details such as company code, customer, amount, currency, date, and creation status.

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 finance operations by replacing repetitive transactional steps with guided natural-language execution.
- Improves speed and consistency in creating down payment requests for customer's promise to pay or commitment to pay.
- Supports governance by routing the request through approved actions, validations, and secure destinations.

- Provides a reusable AI-automation foundation aligned with the broader Intelligent O2C for monitoring of receivables to actual collection.

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	http://sapaz-app01.az.ad.idemo-ppc.com:8000/sap/opu/odata/sap/ZFINANCE_OVERDUE_SRV/doc_createSet?\$filter=customer%20eq%20%270000000160%27%20and%20amount%20eq%20%271.000%27
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
Post Promise to pay document	SAP S/4HANA OData APIs	Post noted item for customer commitment to pay the balance
Outbound Communication Actions	SAP Build / backend communication integration	Send reminders to customers for overdue receivables

Artifacts in the Agent:

Type	Name	Description
Joule Skill	Post Promise to pay document	Post noted item for customer commitment to pay the balance

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 “Down payment creation”

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 “Down payment creation” 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
Create a down payment request as a noted item for customer 1000001 in company code 1010 for USD 10,000	Agent creates a down payment document

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**’.

The screenshot shows the SAP Control Tower interface. At the top, there is a breadcrumb trail: 'Control Tower / Environments / Build Demos'. Below this, there are buttons for 'Edit', 'Share', and 'Delete'. A table header lists fields: 'Last Updated:', 'Author:', 'Members:', 'Identifier:', and 'Description:'. A navigation bar includes 'Projects', 'Triggers', 'Automation Launchers', 'Agent Management', 'Alert Handlers', 'Variables', 'API Keys', 'Visibility Scenarios', 'Processes and Workflows', and 'Joule'. The main content area shows 'Joule Digital Assistant' with a 'Shared' status and buttons for 'Launch', a refresh icon, and a settings icon (highlighted with a red box). Below this is a 'Joule Settings' modal window with the following text: '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.' A toggle switch for 'Share Environment Capabilities' is turned on (highlighted with a red box). At the bottom of the modal are 'Apply' and 'Cancel' buttons (the 'Apply' button is highlighted with a red box).