

PUBLIC

# Custom Joule Skill & Agent in SAP Build Sales Quotations Expiry Assistant

Configuration & User Guide

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This document contains 2 sections. Each section covers different information about this template content package.

1. **Overview:** In this section, you will get quick overview of the use case, what are high-level components used and how the template works in nutshell. Prerequisite section provides information of different services of SAP Business Technology Platform that are required to use this template.
2. **Configuration Guide** It contain sections which will guide you to setup your (a) SAP Business Technology Platform Account with destination, user roles etc., (b) Links and steps to set up Joule studio and Joule (c) Import and configure the template using SAP Build Process Automation - Joule studio

**Note:**

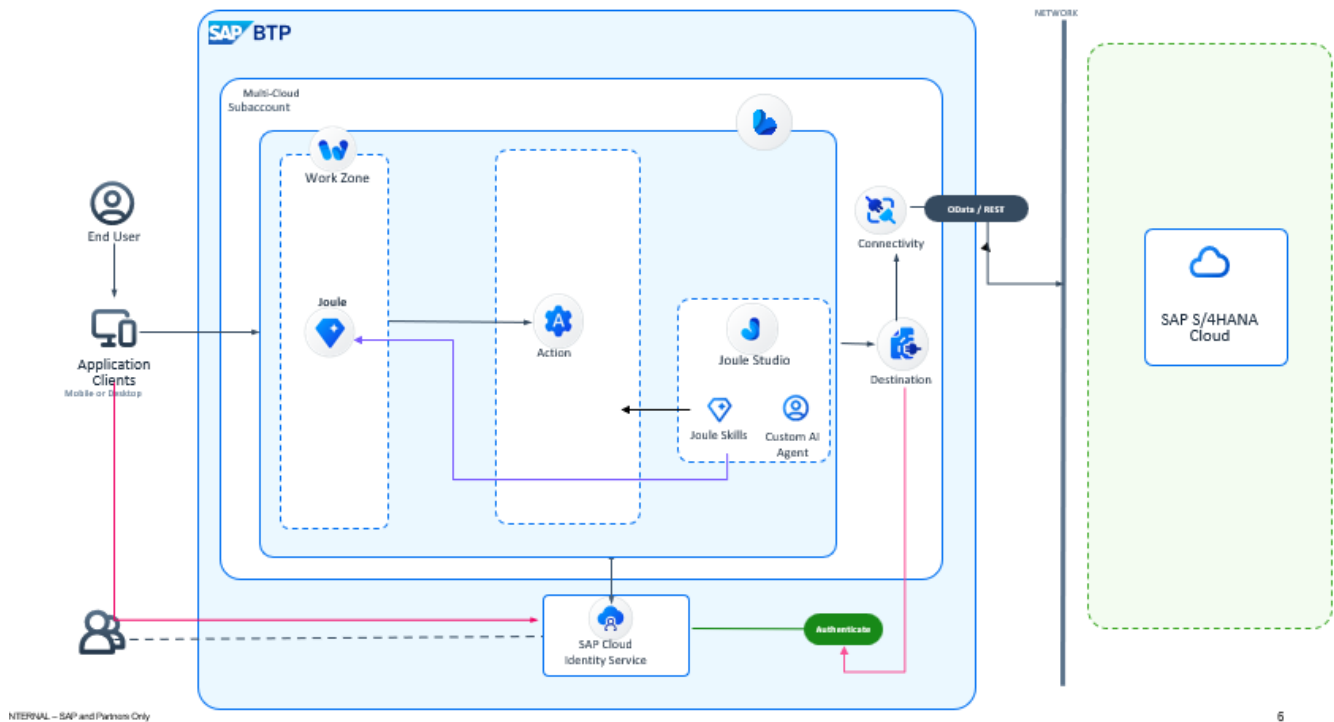
- Learning contents are published only for demo and reference purposes. We do not provide any support to learning / sample content.
- This documentation is not a detailed guide to setup SAP Business Technology Platform services. It assumes that IT admin who is setting the content is skilled with SAP Business Technology Platform environment. **Configuration section must be followed.**
- This template content is to accelerate your solution development. You must modify this template according to your requirements to achieve the desired business goal. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

## Overview

1. This document provides the technical configuration details required to enable and run the “Sales Quotation Expiry Assistant” package agent.
2. The primary audience for this document includes technical stakeholders, such as IT administrators, developers, and functional experts.
3. This Joule Agent is designed to retrieve sales quotations that are approaching expiry within a specified period and present key details—such as Quotation ID, Customer Name, Expiry Date, Net Value, and Status—in a clear, structured, and easy-to-understand format.
4. The “**Sales Quotation Expiry Assistant**” Agent fetches sales quotations nearing expiry from the SAP S/4HANA backend system.
5. If you are new to Joule Studio or would like to explore how AI agents can enhance business workflows, this example provides a practical and ready-to-use business scenario.

## Solution Flow :

### Sales Quotation Expiry Assistant – Flow



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1. The requester (user/business user) interacts with the Agent asking for sales quotations that are about to expire (e.g., “show Quotations expiring this week”).
2. The Agent first understands the user’s intent and checks if a time duration is provided.
3. If the time duration is missing:
  - o The Agent asks a clear follow-up question (e.g., “Please specify the time period like next 7 days or this week”).
4. Once the required duration is available:
  - o The Agent invokes the **‘Retrieve Expiring Quotations’** skill.
  - o The skill internally calls the Business User Details action to get the logged-in user information and then uses the API\_SALES\_QUOTATION\_SRV service to retrieve the relevant sales quotation details. The skill fetches data from the SAP S/4HANA backend system for the logged-in user.
5. The system retrieves sales quotations that are nearing expiry within the specified duration.
6. The Agent presents the results in a clear, business-friendly format with key details:
  - o Quotation ID
  - o Customer Name
  - o Expiry Date
  - o Net Value
  - o Status

## Business Value & Benefits

- **Proactive Sales Follow-ups**  
Helps sales teams prioritize and follow up with customers at the right time.
- **Improved Pipeline Visibility**  
Gives clear insight into expiring quotations and overall sales pipeline health.
- **Increased Productivity**  
Eliminates manual tracking of quotation expiry dates.
- **Better Decision Making**  
Provides key details (customer, value, expiry) in one place for quick actions.
- **Personalized Results**  
Fetches data specific to the logged-in user for relevant insights.

## Prerequisites

For this template to run successfully the following prerequisites are needed.

- Joule Studio in SAP Build  
Follow the setup guide [here](#) based on your tenant configuration.

NOTE: If you need additional help with these prerequisites (such as setting up SAP Build Process Automation and SAP Build Work Zone), you can run the Discovery Center mission: [Setup Joule Studio for a BTP Enterprise Account](#).

## Configuration Guide

### Setup Business Technology Platform Cockpit

#### Configure SAP S/4HANA Destination

This content package can be used with SAP S/4HANA Cloud, Public Edition. Destination can be created accordingly.

Destination Property	Value
Name	<Name>
Type	HTTP
URL	<SAP S/4HANA endpoint> Example: https://<s4system-name>-api.xxxxxxxx
Proxy Type Internet	Internet

Authentication	Basic Authentication
Username	<Username> of the SAP S/4HANA Communication User
Password	<Password> of the SAP S/4HANA Communication User

Add the property **sap.processautomation.enabled** as **true** to view the destination in the SAP Build Process Automation tenant. Please refer [help document](#) for more details.

**NOTE:** Make sure the API used in this template (see the below sections to get the API name) is exposed with the correct communication scenario to the communication user.

### Communication scenarios:

- Business User Logon Details Read Integration- SAP\_COM\_0889,
- Sales Quotation Integration- SAP\_COM\_0118,

### User Roles Configuration

To access this template, the users need to have the roles as described [here](#).

### Services used:

There are two Action projects used in this template. They use different APIs/Services.

Action Project Name	Service Used	Purpose
Business User Details	https://{host}:{port}/sap/opu/odata/sap/ /BusinessUsers	To retrieve the logged in user details from SAP S/4HANA Cloud Public Edition
Service for namespace API_SALES_QUOTATION_SRV	/A_SalesQuotation	To retrieve Quotation Details from SAP S/4HANA Cloud Public Edition

### Artifacts in the Agent:

Type	Name	Description
Joule Skill	Retrieve Expiring Quotations	Retrieves Quotation Details from SAP S/4HANA Cloud Public Edition
Joule Agent	Material and Sales Operations Agent	Agent to retrieve Quotation Details from SAP S/4HANA Cloud Public Edition

## Setup Content Package

### Import Custom Joule Agent

All imported custom agents are available in SAP Build Store. To know more about the SAP Build Store visit [SAP Build Process Automation Store](#).

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 “**Material and Sales Operations 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 “**Material and Sales Operations Agent**” project is available for use.

## Configuration & Modification

Once the Joule Skill & Agent project is added into the lobby, it can be run directly without any modification.

However, if you need to modify Joule skills that are used within the project or you want to modify the agent, with its instructions/additional context or other fields, you can do so.

In order to understand the various capabilities of Joule Studio and work with them please refer to the link: [Create AI Capabilities | SAP Help Portal](#)

## 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
Fetch the quotations that are expiring on 1st Jan 2025 at 11:00 AM to 9th December 2025 at 11:59 PM	The quotation details for the logged in user will be retrieved from SAP S/4HANA

**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 must switch the toggle on for '**Share Environment Capabilities**'.

