

SAP CLOUD PLATFORM | EXTERNAL

End User Guide

Vendor Onboarding

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Overview

This document provides information about how to use the user interfaces of Vendor Onboarding process. Process Operators, Approvers, Requestors, Procurement IT are the target users of the user interfaces explained in this document.

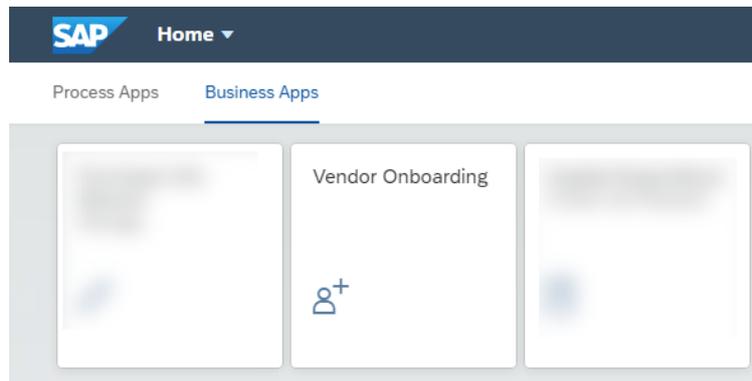
Vendor Onboarding live process content package enables to automate vendor creation process in a flexible and transparent way. It provides flexibility in executing a specific variant of the process depending on attributes like account group, vendor type, department, etc. When a user submits a request to register a new vendor, a pre-configured process variant is triggered in SAP Cloud Platform Workflow Management based on configurable business conditions. On approval from all parties involved, the vendor is created in SAP ERP. Salient features of this content package are mentioned below:

- Create vendor for all usage types (Accounting, Purchasing, Centrally available and general-purpose vendors).
- Option to either let the vendor can directly access the cloud application to fill in their basic details or any internal team (including shared services) can do the same.
- Multiple approval steps can be added for each activity / department.
- The approvers are automatically assigned based on a configurable business rule.
- Add custom business validations or restrictions (based on attributes like accounting group, purchase org, country, etc.).
- Automatic email notification to all parties involved.
- On approval from all parties involved, the vendor is automatically created in SAP ERP.
- New variant of the process can be created using the pre-delivered process steps in a now-code / low-code approach.
- Out of the box visibility into the key process performance indicators.

Vendor Onboarding

The applications that are part of Vendor Onboarding content package will be available in the SAP Fiori Launchpad. Check with your administrator for the link to access the same.

This application, accessed from a tile in SAP Fiori Launchpad, can be used to submit a request to onboard / create a new vendor.



Use the application to fill in the requestor & vendor basic details (like name, contact number & email) and submit the request using the *Register* button. Based on the account group and vendor creation mode (accounting, purchasing, centrally available or general-purpose vendor) the next steps in the process are automatically determined.

A screenshot of the SAP Vendor Onboarding application form. The top header shows 'SAP Vendor Onboarding' with a search icon and a user profile icon. Below the header, there are two tabs: 'Requester Details' and 'Vendor Details', with 'Requester Details' being the active tab. The form is divided into two main sections: 'General' and 'Contact'. The 'General' section contains fields for 'Request ID' (with the value '1594272459'), 'Name', 'Employee ID', and 'Request Date & Time' (with a date picker icon). The 'Contact' section contains fields for 'Number', 'Email', and 'Confirm Email'. At the bottom right of the form, there is a blue 'Register' button.

My Inbox Tasks

Once the request to create a new user is submitted, based on the business configuration respective users will receive tasks in My Inbox application.

SAP Cloud Platform Workflow Management My Inbox enable line of business users to claim and complete their task. Please go through [SAP My Inbox documentation](#) for more details.

Create User for Vendor

If the process is configured to invite the vendor to fill in their basic details (like address, contact, etc.) then a task is created for an IT Administrator to create and provide the URL and credentials to the access My Inbox in SAP Cloud Platform. The IT Administrator is presented with the details captured while submitting the request. After provisioning a user in the identity and authentication account, the same is shared in the application.

Note: If the process is configured to fill the vendor details by a team within the organization, then this task is skipped.

Create User for Vendor

Create User for Vendor Seshadri SE

Requester Details **Vendor Details** Add User Details

Name:

Vendor Creation Mode:

Account Group:

Contact

Number:

Email:

Add User Details

My Inbox URL: *

User: *

Initial Password: *

[Show Log](#) [Claim](#) [🔗](#)

Register New Vendor

In this task, either vendor or a team within the organization (example, shared service center) will be able to fill in the general details about the vendor like address, tax information, bank details, contact persons within the vendor organization, etc.

If the process is configured to invite the vendor to fill the basic details, then the vendor is automatically notified about the task along with the URL and credentials to access SAP My Inbox application in your SAP Cloud Platform account. However, if the process is configured to fill the vendor basic details by a team within the organization (example, shared service), then they will be notified about the task.

The application can capture the basic details, control data, payment transaction and contact persons of the vendor. The (default) mandatory fields in the application are City, Country/Region Key and Language Key. However, additional fields can be made mandatory based on a configuration using business rules. After filling the required details of the vendor click Submit button to confirm the submission.

Register New Vendor

Basic Details Control Payment Transactions Contact Persons

General	Company Address
Vendor Creation Mode: <input type="text" value="Centrally"/>	Street: <input type="text"/>
Account Group: <input type="text" value="0012"/>	House Number: <input type="text"/>
Title: <input type="text"/>	Postal Code: <input type="text"/>
Name: <input type="text" value="Seshadri SE"/>	City: * <input type="text"/>
<input type="text" value="Vendor Name2"/>	Country/Region Key: * <input type="text"/>
<input type="text" value="Vendor Name3"/>	Region Key: <input type="text"/>
<input type="text" value="Vendor Name4"/>	Tax Jurisdiction: <input type="text"/>
Search Term: <input type="text"/>	House Number Supplement: <input type="text"/>
Language Key: * <input type="text"/>	

[Submit](#) [Show Log](#) [Claim](#) [↗](#)

GPO Approval

If the process is configured to get an approval from the Group Purchasing Organization (GPO), then the responsible person will automatically get an email notification along with the approval task in his/her My Inbox application. The user is presented with all the information that has been captured in the previous tasks and can either Approve or Reject the request with a comment.

If rejected, then after a notification to the involved parties, the processing is stopped.

GPO Approval for Onboarding Vendor

GPO Approval for Onboarding Vendor : [REDACTED]

Created On: [REDACTED] Priority: **Medium** Due On: **Jul 10, 2020**

[Basic Details](#) [Control](#) [Payment Transaction](#) [Contact Persons](#) [Add Comment](#)

General Details

Vendor Creation Mode:	<input type="text" value="Centrally"/>
Account Group:	<input type="text" value="0012"/>
Title:	<input type="text" value="Company"/>
Name:	<input type="text" value="[REDACTED]"/>
Name2:	<input type="text" value="[REDACTED]"/>
Name3:	<input type="text" value="[REDACTED]"/>
Name4:	<input type="text" value="[REDACTED]"/>
Search Term:	<input type="text" value="[REDACTED]"/>
Language:	<input type="text" value="English (E)"/>

Company Address

[Approve](#) [Reject](#) [Show Log](#) [Claim](#) [\[Share\]](#)

Enrich Purchasing Data

If the vendor creation mode was either Purchasing or Centrally available vendor, then a task is created for a user in the purchasing department to enrich the vendor details with purchasing-related information.

The application has six sections:

- Basic Details, Control, Payment Transactions and Contact contains the previously captured information and in read-only mode.
- A user from the purchasing department should fill the Purchasing Data and Partner Functions section.

After filling the details, the user will be able to submit the information for approvals.

Enrich Purchasing Data

Basic Details Control Payment Transactions ▾ Contact Persons Purchasing Data Partner Functions

General Details	Company Address
Vendor Creation Mode: <input type="text" value="Centrally"/>	Street: <input type="text"/>
Account Group: <input type="text" value="0012"/>	House Number: <input type="text"/>
Title: <input type="text" value="Company"/>	Postal Code: <input type="text"/>
Name: <input type="text"/>	City: * <input type="text"/>
<input type="text"/>	Country/Region : * <input type="text" value="Germany (DE)"/>
<input type="text"/>	Region: <input type="text" value="Schleswig-Holstein (01)"/>
Search Term: <input type="text"/>	Tax Jurisdiction: <input type="text" value="AA"/>
	House Number Supplement: <input type="text"/>

[Submit](#) [Show Log](#) [Release](#) [↗](#)

Approve Purchasing Data

If the process is configured to include one or more approval steps from the purchasing department, then the respective user will get a task in their My Inbox application to verify the captured data. The user is presented with all the details relevant for the purchasing department and will be able to either Approve or Reject the request with comments.

Enrich Accounting Data

If the vendor creation mode was either Accounting or Centrally available vendor, then a task is created for a user in the accounting department to enrich the vendor details with accounting-related information.

The application has seven sections:

- Basic Details, Control, Payment Transactions and Contact contains the previously captured information and in read-only mode.
- A user from the accounting department shall fill the Accounting Details, Accounting Payment Transactions, Accounting Correspondence sections.

After filling the details, the user will be able to submit the information for approvals.

Enrich Accounting Details

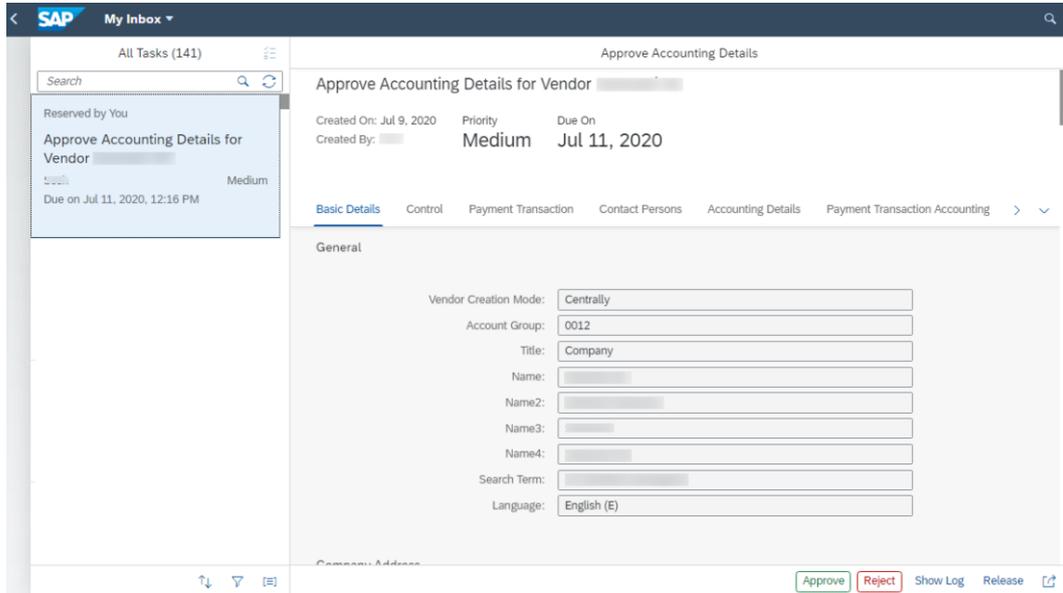
< Payment Transactions | Contact Persons | **Accounting Details** | Payment Transactions Accounting | Correspondence Accounting >

Accounting Information	Interest Calculation
Company Code: * 10	Interest Calculation Indicator: 01
GL Reconciliation Account : 11050500	Last Key Date: 2020-07-07
Assignment Numbers Sorting Key: 0019	Interest Cycle: 1
Cash Management Group: A1	Last Interest Run: yyyy-MM-dd
Head Office: 	
Authorization: 	
Release Group: 	
Minority Indicators: 	
Certification Date: yyyy-MM-dd	

Submit Show Log Release

Approve Accounting Details

If the process is configured to include one or more approval steps from the accounting department, then the respective user will get a task in their My Inbox application to verify the captured data. The user is presented with all the details relevant for the accounting department and will be able to either Approve or Reject the request with comments.



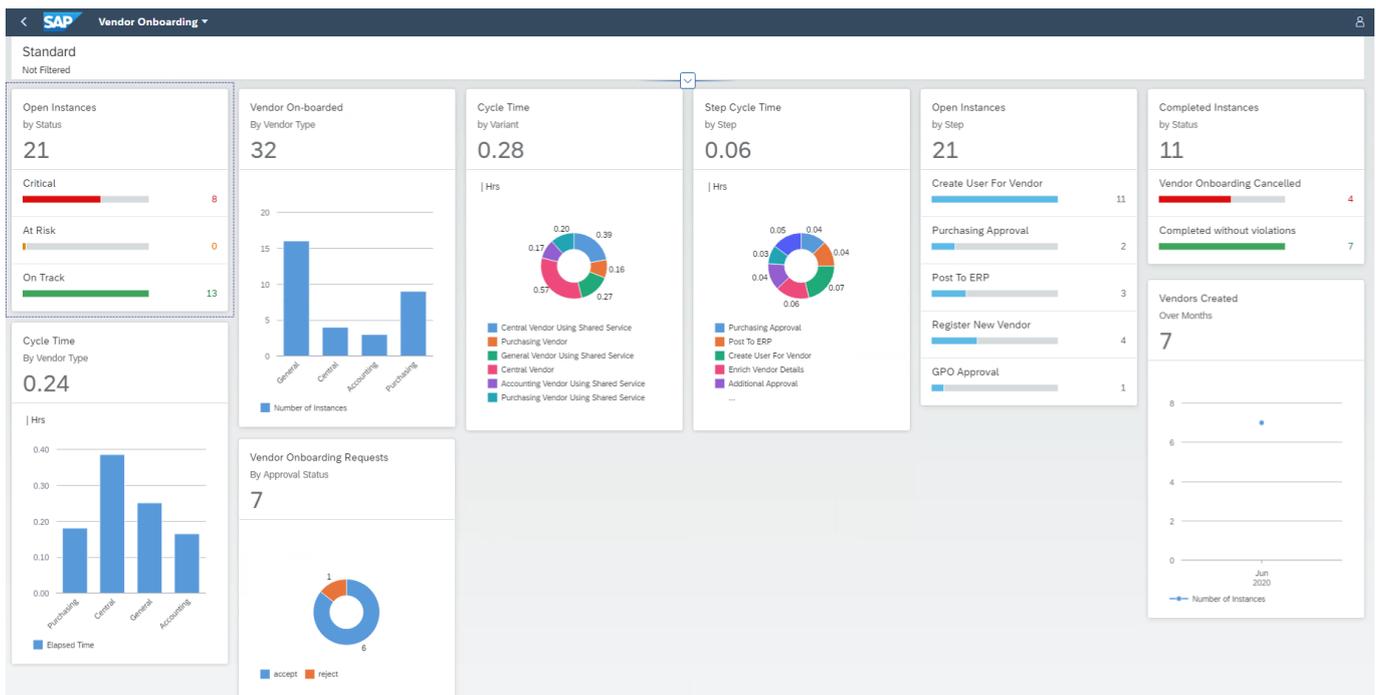
Process Visibility Workspace

Process visibility enable Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. Process visibility capability enable customers gain out of the box process visibility into their deployed processes. Please refer [help documentation](#) for more details.

The Vendor Onboarding live process content package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Cloud Platform Workflow Management. A process owner or line of business expert will be able to enhance the visibility scenario.

Access Process Workspace

1. Go to Process Flexibility Cockpit.
2. Select Vendor Onboarding.
3. Click Live Process Insights – Vendor Onboarding.



Please go through [help documentation](#) how to access process workspace.