AI-based Work Item (Invoice) Prioritization for Buyer Portal

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V1.0

Overview

Using AI, we aim to provide users with clear visibility into high-priority invoices demanding immediate action. This approach enhances workflow efficiency and facilitates timely payments to vendors.

With the power of AI, the system thoroughly reviews all work items in users' buckets, transcribe the key invoice information, and provide actionable recommendations.

How AI based prioritization works?

• Users have visibility into a separate queue for shortlisted high-priority invoices by AI, positioned at the forefront of the queue list.



• Users get the invoice list view with one click on the dashboard.

mpoct A P	ADVANCE				Default sorting based on Ranking. High priority invoice will be on top						
Smarth	9										
Invoice 27	Priority at Ranking	Priority Factor Reasoning 17	Priority Type 17	Greated Lt	Created Data 17	Garrency ut 150 Code	Last ut Modifie ut	Lest Modified Data 17	Current State UT	Document Type 4	
INV-003330	66 (0)	Urgant comment history	BuyerPriority	her UM	09/12/2024 5:47 PM	U.S. Dollar	Iwc UM	09/12/2024 5:47 PM	Pending Approval	Nan PO Invaice	
NV-003330	21 0	Critical vendor and urge	BuyerPriority	herc UM	09/12/2024 9:40 PM	U.S. Dollar	Ive UM	09/12/2024 9:40 PM	Pending Approval	Non PO Invoice	
INV-003330		Urgent comment history.	BuyerPriority	Inc UM	09/12/2024 9:40 PM	U.S. Dollar	Iwc UM	09/12/2024 9:40 PM	Pending Approval	Non PO Invoice	
PO-003330	22 0	Urgent comment.	BuyerPriority	Inc UM	09/12/2024 2:05 PM	U.S. Dollar	Iwc UM	09/12/2024 2:05 PM	Pending Approval	Non PO Invoice	
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- Accompanying this separate queue is a summary that provides detailing why invoices within it are deemed most critical by AI.
- Users get the rationale behind the prioritization of invoices that helps in understanding the urgency assigned by the AI system.
- Users can view on the edit page, the AI banner & ranking based on condition for the queue.

Custom Metadata Types			
en Al System Configuration	(Managed)		
en Al System Conliguration	(Managed)		
en Al System Configuration Detail	Edit Clone		
Label	GenAl_System_Config_BP	Protected Component	
Gen Al System Configuration Name	GenAl_System_Config_6P	Namespace Prefix	CoraAP
AP Integration Record Name ()	Azure OpenAl Buyer	Recalculate Ranking Enabled o	1
System Instruction Prompto	You are an Accounts Payable SME tasked with analyzing invoice data and assigning a Priority Factor ranging from 1 to 5 (where 1 signifies highest priority and 5 signifies lowest priority). This Priority Factor will be utilized to generate a prioritized queue of invoices for processing.	Recalculate Ranking Field APIs G	CoraAPAmountc
Query Prompti)	Please evaluate the above invoice X values and provide a Plority factor from 1 to 5, where 1 represents the most host protors and 5 represents the least priority factors the interview of the used to create a priority quive for processing the invoices. Also provide the reasoning that the ployen factor. The reasoning should be concrets, holpitingthe notable point in strictly least than 15 words. Here are a few examples of invoice data with their corresponding Priority factors for reference.	Exclude Few Shot Examples()	
Response Format Prompt()	Please evaluate the given X involce data and provide the appropriate Priority factor. Provide a response in only the following format. [Priority factor only integer value] (the reasoning in strictly less than 15 words) Your task is to generate a response string in the required format.		
Created By	5/26/2024 3:42 PM	Last Modified By	7/22/2024 2:52 Pt

• Feedback section is available in the user action section, for all queues along with AI if it is configured from Admin.

However, the Feedback section is not prefilled and is optional for users.

Bit "Azure OpenAl Buyer"	
✓ Integration Information	
Integration Name	
Azure OpenAl Buyer	
Do you want to send attachment?	
 Integration Connection Params 	
Integration Connection Params End Point	Method
Integration Connection Params Ind Point azureProxyService	Method
Integration Connection Params End Point azureProxyService Token End Point	Method Authorization Token (Static)
Integration Connection Params End Point azureProxyService Tokes End Point	Method Authorization Token (Static)
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Integration Connection Params End Point azureProxyService Tokes End Point Do you want to insert Remote Setting ? Maximum Attempt Static Token Validity (Dayx)	Method Authorization Token (Static) Static Header Param (# Separator) Token Body

Configure Processor portal

As an administrator, set up the configurations for batch processing of the invoices such as invoice filter criteria, invoice current states (for which Gen AI priority ranking responses are essential), and Invoice field APIs that need to be included for the prioritization.

Also, to enable gen AI services for a customer, configure the subscription or trial status and the allotted tokens with a unique client identifier in Azure Proxy Services. The same client identifier must be included in the Named Credential as a custom header using the key "client_token".

To implement trial-based Gen AI Services for Genpact AP Advance, create the Azure Proxy Services. During the trial phase, buyers have access to an AI-powered queue, allowing them to swiftly address invoices requiring urgent attention. Once the trial concludes, the AI-powered queue is temporarily disabled, prompting the users to contact the Admin for subscription options to unlock the full AI feature.

1. Setup AI configurations

Create a new record of 'Gen AI System Configuration' custom metadata with the name given in the *AP_GenAICustomMetadataRecordNameForBP* label.

- 1. Log in to Salesforce as an administrator.
- 2. Go to Setup and type and select Custom Metadata types from the quick find box.
- 3. Click Manage Records for Gen Al System Configuration >> GenAl_System_Config_BP (Name should be in sync with the label AP_GenAlCustomMetadataRecordNameForBP)>> Edit.
- 4. Modify AI related configurations.

Entity/Object Configuration

Add More	
	Entity JSON
× 🗷	[{"apiName":"CoraAP_Document_Type_c","EntityName":"equal to","objectVal":"CoraAP_Invoice_c","req":false,"type":"PICKLIST","value":"Non PO Invoice"},("apiName":"CoraAP_Amount_c","EntityName":"greater than","objectVal":"CoraAP_Invoice_c","req":false,"type":"DOUBLE","value":"5000"}]

- AP Integration Record Name: Use this field to add name (API_Name__c) of the AP Integration record to use for AI Integration configurations.
- Recalculate Ranking Enabled: Use this field to enable or disable recalculation of Priority Ranking on the Invoice. The criteria for recalculations can be configured in 'Recalculate Ranking Field APIs' field.
- Recalculate Ranking Field APIs: Use this field to add Invoice field APIs as ',' separated, which are used for recalculation of the Priority Ranking. The change in these field values while the invoice is still eligible for the AI response, invokes recalculation, which is evaluated in the next batch processing.
- Exclude Few Shot Examples: Use this field to exclude Invoice Few Shot Examples from AI request, which are used as Priority Ranking reference.
- System Instruction Prompt: Use this field to add System Instruction prompt to give directives to AI model. Changes in this field are recommended for periodically prompt improvement purposes only.
- Query Prompt: Use this field to add Query Instruction prompt to give directives to AI model. Changes in this field are recommended for periodically prompt improvement purposes only.
- Response Format Prompt: Use this field to add Response Format prompt to give directives to AI model. Changes in this field are recommended for periodically prompt improvement purposes only.

2. Create a Named Credentials

Create a Named Credentials to integrate with generative AI API callouts. For details on creating Named credentials, seethis document.

NOTE

In case we want to use Endpoint URLs directly instead of creating Named Credentials, create a remote site setting for the given URL.

3. Al Integration Setup

As an administrator set up one-time configurations (defined in Setup Configuration section) for batch processing of the invoices such as invoice filter criteria's, invoice current states for which Generative AI priority ranking responses are essential, and invoice field APIs that need to be included for the prioritization.

The existing AP Integration tab is used for configurational setup of Genpact AP Advance integration with Azure OpenAI. Enable AP Integration tab in the org, if it is not enabled already. Below is the list of required configurations and how they are provided using the AP Integration page.

• Integration name:

- AP Integration Tab UI Field: Integration Name
- Use this field to add the name of the AP Integration record.
- This field value should be used in Setup -> Custom Metadata -> Gen AI System Configuration -> Manage Records -> Edit record -> AP Integration Record Name field value to get integration configurations.

• Enable generative AI callout:

- AP Integration Tab UI Field: Active/Inactive toggle
- This field is used to enable or disable Genpact AP Advance Generative integration.

• Named credentials name:

- AP Integration Tab UI Field: End Point
- Use this field to add the name of the Named Credentials used to integrate with Generative AI Services.
- End point URL:
 - AP Integration Tab UI Field: Token End Point
 - Use this field to add the Endpoint URL to connect with Generative AI-Genpact AP Advance Azure Proxy services. Use this field if named credentials are not created.
- Client token:
 - AP Integration Tab UI Field: Static Header Param (#Separator)
 - Use this field to add the unique client identifier for the customer. The same identifier is configured in Azure Proxy Service along with trial/subscription status and respective tokens. Use this field when named credentials are not created.
- Batch start current states:
 - AP Integration Tab UI Field: Batch State (ML Scenario)
 - Use this field to add the current states of the invoice as ',' separated values for which Generative AI prioritization response is required.
- Invoice field APIs to Include:
 - AP Integration Tab UI Field: Code Prediction
 - Use this field to provide invoice critical/key fields that are required to determine priority. Add field APIs with namespace in the below format.

{
 "System_Default": "Field_API_1, Field_API_2, Field_API_3"
}

Batch size:

- AP Integration Tab UI Field: Batch Size
- Add the size of the batch chunks in which invoice records get processed to invoke generative AI response. Make sure the batch size doesn't exceed callout limits of Generative AI model.

• Invoice filter criteria to invoke AI response:

- AP Integration Tab UI Field: Entity/Object Configuration
- Use this field to filter invoices for which Generative AI response will be invoked. Use the Entity JSON in the following manner.
 - Choose object Select Invoice object from the picklist.
 - Field Chose Invoice field from the invoice.
 - Entity name Add invoice field condition operator as string literal.
 - Entity value Add invoice field value.

Operator	String literal
=	equal to

Operator	String literal
!=	not equal to
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to

NOTE

Custom Metadata 'Gen AI System Configuration' record for Buyer Portal will be created as part of the salesforce package by the name given in the Label 'AP_GenAICustomMetadataRecordNameForBP', which can be modified as per the requirements.

A record of AP Integration will be created using post install script by the name provided in the custom metadata record field. By editing the given record, the above configuration can be done.

Once the configuration set up is complete, schedule the batch class 'APGenerativeAIBatch' periodically as per the business requirements. The batch class will generate priority rankings using Generative AI for the eligible invoices.

Static Token	Yalidity (Days)	Entity Manager							
✓ Entity/Ob	gect Configuration	✓ Choose Object Invoice	:						
Add More		Field		Entity Name	Entity Value	Required			
	Entity JSON	Document Type	:	equal to	Non PO Invoice				
	Handson (Marshill)	Amount	:	greater than	5000		×+		
ל	to"/object/ul/r/Cora4P Invoice"),("apiName"/"C than", "object/ul/r/Cora4					Cancel	Save		

Set up Invoice Few Shot examples

Buyer Subject Matter Experts (SMEs) need to create an Invoice Few Shot Examples Excel file for the examples. This document contains sample data of key invoice fields, which are configured in the Setup Configuration, with the expected Priority Ranking from 1 to 5 (where 1 signifies highest priority and 5 signifies lowest priority). Considerations for creating these examples are defined in the Sample Invoice Few Shot Example section.

The system with Integration Daemon stores the data from the Invoice Few Shot Example Excel file as records of Invoice Reference Data object.

Invoice Few Shot examples are sample invoice records with key/critical fields data with their expected Priority Ranking provided by SMEs. These examples will work as a reference basis for Generative AI.

These examples should be created in CSV/Excel format which will be inserted in the system as Invoice Reference Data records using Integration Daemon.

Considerations while creating Invoice Few Shot Examples:

These records consist of critical/key fields of invoices, serving as the basis for Generative AI to determine Priority Ranking.

NOTE

These key fields are the same that have been configured in the setup configuration in Code Prediction (Invoice Field APIs to Include).

Based on the records data, Priority Ranking should be provided by SMEs.

Include realistic but diverse examples – Create invoice records that reflect realistic scenarios but also vary in complexity, size, and characteristics.

Ensure a balanced distribution of attributes/fields values across the sample records to prevent bias and provide a fair representation of different Invoice scenarios.

Sample Invoice Few Shot Example

InvoiceIdentifierFi eld	KeyField1	KeyField2	KeyFeild3	Priority Ranking
invoice1				1
Invoice2				3
Invoice3				2
Invoice4				5
Invoice5				1
Invoice6				4
Invoice7				3

See a sample format here.

NOTE

- The example CSV should not contain more than 1500 words.
- The file will work for both Buyer and Processor portal.

Procedure to configure Buyer portal

1. Set up SObjects

- 1. Log in to the Buyer Portal as an administrator.
- 2. Go to Setup >> SObjects >> Manage sObjects.
- 3. Add Invoice Extension and Invoice Priority Feedback from Salesforce SObjects to Local SObjects as shown below:

Salesforce Org 50b)	ects User Happings SSO Configu	ration Org Logo	comparation	Tab Configuration	Email Configu	Template Configu	ration Gdpr Confi	guration Sy
Sobjects	ECTS						< Back t	olist C I
ALESFORCE SOBJECTS		D, exten 3			LOCAL SOBJECTS		(Q Search Sol
LABEL	API NAME	CUSTOM AC	CTIONS []	>>	LABEL	API NAME		CUSTOM
Change Event: Invoice Extension	AP_Invoice_ExtensionChangeEven	t		4	Accepted Event Relation	AcceptedEventR	lelation	
Change Event: User	AP_User_Master_ExtendedChange				Access	WorkAccess		
Master Extended					Account	Account		
Configuration	ChatterExtensionConfig				Account History	AccountHistory		
Extension	ChatterExtension 4				AP Tax	AP_Taxc		~
Invoice Extension	AP_Invoice_Extensionc	~			Approval Detail	Approval_Detail	c	~
User Master Extended	AP User Master Extended c	~			Approval Group	Approval_Group	c	~
					Member	Approval_Group	Memberc	~
Tabs 🕲 Layouts	Reports Q Lookups ##	Components III	Bulk Creation	1. User Manager	Member	Approval_Group	Configure Dashboard	Mobile
Tabs 🗃 Layouts Salesforce Org SObje	Reports Q Lookups III	Components 🏢	Bulk Creation	2 User Manager Configuration E	Member nent 🕸 Setup mail Configura	Approva_Group Languages	Configure Dashboard Gdpr Configuration	Mobile System Con
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2. Create AI dashboard queue

- 1. Go to Components >> Dashboard Components >> Create Component.
- 2. Create AI dashboard queue following highlighted configurations as shown in example screenshots below:

Edit Dashboard Components			<	lack to components 🗸 🗸 Save
Rjet		Active 7	Active on Mobile 7	
Invoice Extension	Q,			
u		Description		
ign Priority		Hey ILOGGED_IN_USER.First_NameC), here are the work items that needs immediate attention.	
Note Clause		Info Message		
CoraAP_AP_Is_Active_Response_c = True AND CoraAP_AP_Type_c = 'BuyerPriority'		Hey BLOGGED_IN_USER First_NameC), here are the work items that needs immediate attention.	
)		Detail SObject		
		Invoice		Q,
47		Relative field		
10		Invoice		~
sup By (Por v2 only)		Tree		
Invoicec		Paulitaneth L Paul		

NOTE

Make sure the value of CoraAP__AP_Type__c in Where clause is "BuyerPriority", as it comes from the label in Salesforce.

Points to note for highlighted fields shown above:

Added a new configuration for **LIMIT** at queue level. If there is data available in the limit configuration then only that number of invoices will be fetched.

Points for Where Clause field:

If the Where Clause of a queue contains a nested query (or the queue is AI queue because in this case, we create a

nested Where Clause at the backend) group by field should be a mandate if we are giving a LIMIT because of a salesforce limitation.

For AI queue we are combining the Where Clause of all the invoice queues (except for special queues or if any queue contains a nested query) in OR and then adding the Where Clause of AI queue in AND.

If there is no Where Clause on AI queue all the invoices present in all other queue will be accessible from AI queue.

if there is a Where Clause present in that queue, Only the invoices which satisfy the AI queue condition, and all other queue condition will be accessible from AI queue.

G genpact			
Tabs 🛱 Layouts 🖵 Reports (Q Lookups III Components III	Bulk Creation 💈 User Management 🕸 Setup	S Languages S Configure Dashboa
Generic Components Static Components	Dashboard Components ML Comp	onents Suggested User Action Multiple GRN Compo	onents
Edit Dashboard Compone	ents		< Back to co
ide Save Button?	Hide Reset button ?	SPOC Queue?	
scall Config?			
		Approver Queue 7	
en Al Suggested Queue ?	Gen AI Color Coding		
	Enter The color cobr ["fieldAPI":"Cor ["ranking":"3"."	aAP_AP_Priority_Ranking_c*,"colorCoding"{["ranking";"1","color": color":"#F8CC88"),["ranking":"4","color":"#F9E2C6"],["ranking";"5","c	"#FF9797"),("ranking":"2","color":"#FF8A8A"), color":"#F9F4C6"}))
			pa (

Enable "Gen AI Suggested Queue ?" toggle. Also, configure the "Gen AI Color Coding" as shown above.

Configure Component fields to be shown on UI.

	Component Fields										
	LABEL	DISPLAY LABEL	REFERENCE	HIDDEN	SAVE ON ACTION	CARD VIEW	SEARCH FIELD	RANGE SELECTION	GROUP SELECTION	DECIMAL INPUT	SORT BY
1	Invoice	Invoice	@ Name					Config	ure fields to be shown on UI		
2	Invoice Extension Name	Invoice Extr						2			
з	Priority Ranking	Ranking									

Configure the Detail SObject Component fields to be displayed in UI.

ø	Detail SObject	Component Fields									
	LABEL	DISPLAY LABEL	REFERENCE	HIDDEN	CARD VIEW	SEARCH FIELD	RANGE SELECTION	DECIMAL INPUT	SORT BY	TYPE	ACTION
1	Current State	Current State				$\bigcirc \bigcirc$	Configure fields	to be about on		picklist	×
2	Document Type	Document Type					Configure metal	JI		picklist	×
3	Approval State	Approval State								picklist	×
4	Approval Status	Approval Status								picklist	×
5	Current Approver	Current Approver	Ø Name							reference	×

NOTE

Grant access to this queue for the necessary user-profiles and include the queue in the dashboard configuration section. For detailed instructions, please consult the Genpact AP Advance Buyer Portal configuration guide, which provides information on setting up dashboard queues and managing user profile access.

- 3. Configure Related Lists objects on Invoice Edit layout
 - 1. Go to Layouts.
 - 2. Click edit for Invoice Edit Layout.
 - 3. Drag and drop AP INVOICE EXTENSIONS and AP INVOICE PRIORITY FEEDBACKS from RELATED LISTS widget and configure:

Tabs Layouts Q Lo	okups III Components III Bulk Cre	ation 🛔 User Management 🏚 Setup	G Languages	pile		
Invoice : Edit layout			< Back to list	✓ Save		
>_ FIELDS	AP INVOICE EXTENSIONS			×××		
Q. Bearch.	PRIORITY RANKING	PRIORITY FACTOR REASONING	INVOICE EXTENSION NAME	-		
	Priority Ranking - 1	Priority Factor Reasoning - 1	Invoice Extension Name - 1			
Drag and Drop	Priority Ranking - 2	Priority Factor Reasoning - 2	Invoice Extension Name - 2			
abod from here mula	Priority Ranking - 3	Priority Factor Reasoning - 3	Invoice Extension Name - 3			
	Priority Ranking - 4	Priority Factor Reasoning - 4	Invoice Extension Name - 4			
Account Supplier Number sing	Priority Ranking - 5	Priority Factor Reasoning - 5	Invoice Extension Name - 5			
AccountNo encryptedutring	AP INVOICE PRIORITY FEEDBACKS			×××		
COMPONENTS	FEEDBACK RANKING			_		
RELATED LISTS	Feedback Ranking - 1					
	Feedback Ranking - 2					
WIDGETS	Feedback Ranking - 3					

4. Go to settings for AP INVOICE EXTENSIONS related lists object and configure as highlighted in the example screenshot below:

		GenAl Extension Obj GenAl Priority Feedback Obj	ect ?	elated List Properties enable toggle
qD	Related List Fields			
e.	LABEL	DISPLAY LABEL	REFERENCE TYPE	MULTI-CURRENCY HIDE PRECEDING ZERO? GROUP SELECTION ACTION
	Priority Ranking	Priority Ranking	PICKLIS	IT X
2	Priority Factor Reasoning	Priority Factor Reas	STRING	
3	Invoice Extension Name	Invoice Extension N	STRING	
	6			configure these fields as shown in the same order as shown - None - + Add
				Cancel 🗸 S

5. Now go to settings for AP INVOICE PRIORITY FEEDBACKS related lists object and configure as highlighted in example screenshot below:

	VIEW LINK PIERU	None		
enable toggle	Config GenAJ Extension Object ? (this config can be copied and modified, else by default the tooltip config will be used	
Related List Fields	GenAl Feedback Config	['userid''CorsAP_AP_Feedback _Estension_c', "invoiceid''CorsA	User_c^;userProfile*/*CorsAP_AP_feedback_Profile_c*;extensionObjid*/*Cor hvroice_c*)	aAP_AP_Invoice
# LABEL DISP	PLAY LABEL REF	ERENCE TYPE	MULTI-CURRENCY HIDE PRECEDING ZERO? GROUP SELE	ECTION ACTION
e LABEL DISF 1 Feedback Ranking Fe	edback Ranking	PICKLIST	MULTI-CURRENCY HIDE PRECEDING ZERO? GROUP SELE	ECTION ACTION
# LABEL DISF 1 Feedback Ranking Fe	LAY LABEL REF	PROXIST	MULTI-CURRENCY HIDE PRECEDING ZERO? GROUP SELF	ECTION ACTION
# LABEL DISP 1 Feedback Ranking Fe	LAY LABEL REF	PICKLIST	MULTI-CURRENCY HIDE PRECEDING ZERO? GROUP SELF	ECTION ACTION

4. Procedure to Configure Buyer Portal Trial

To set up the trial version for AI, as an administrator configure the following.

- 1. Login to the Buyer portal.
- 2. Go to Components >> Dashboard Components >> open High Priority queue >> Gen AI Integration Config will contain the below JSON by default (you can copy and edit the JSON as per your requirements).

```
{
    "genAlIntergrationName":"Azure OpenAl",
    "genAlSubscriptionValues":[
    {"fieldApiName" : "CoraAP_State_c"},
    {
        "underTrial" : "under Trial",
        "trialExpired" : "trial Expired",
        "trialGoingToExpire" : "Trial Going to Expire",
        "subscription" : "subscription",
        "subscriptionExpired" : "subscription Expired",
        "subscriptioGoingToExpire" : "Subscription is going to be expired."
    }],
    "TokenExpiryField" : "CoraAP_AP_Token_Expiry_Alert_c"
}
```

Description of fields mentioned in above JSON:

- **genAlIntergrationName**: Mention the API_Name__c field Value of the AP Integration record in salesforce which is used for configured setup for AI integration (for example "API_Name__c' = 'Azure OpenAI").
- **genAlSubscriptionValues** 'fieldApiName': Mention the field api name of AP integration object of salesforce which stores trial/subscription status (for example "fieldApiName" : "CoraAP__State__c").
- **TokenExpiryField:** Mention the field api name of invoice extension object which is used is used as a flag to indicate sub/trial about to expire. (For example, "TokenExpiryField" : "CoraAP__AP_Token_Expiry_Alert__c").

On Salesforce, 'AP_Integration__c' object requires the following fields to get trial status:

- API_Name__c: Indicates which record is being used for getting trial status (for example 'API_Name__c' = 'Azure OpenAI').
- 'State__c': Contains the trial values. Map the values according to JSON. (right side values in JSON should be on Salesforce).

Points to Note

- If there is some mismatch in configuration then the status is 'trialExpired'.
- If status is trialGoingToExpire or trialExpired or subscriptionExpired, then export for AI queue is disabled thus disabling the export of invoices.
- For a blur invoice, data isn't copied and tooltip is disabled.
- The product/support team needs to provide the required number of tokens to be configured for the required Customer as per Trial/Subscription.