

# cepheo

## Cepheo Punchout Procurement

Increase order accuracy and speed of processing with Cepheo Punchout Procurement

# What is Punchout procurement?

- **Punchout procurement is a type of interaction between a vendor's web storefront and a buyer's procurement application.**
- **Through the Punchout mechanism, buyers can access a supplier's Punchout-enabled ecommerce website, be automatically logged in, search the catalog, configure items, add them to the shopping cart, and return the cart back to the procurement system.**

# Standard Dynamics 365 Punchout (External catalog)

- **Standard Dynamics 365 have punchout through External Catalog, where you can connect to the vendors website and transfer shopping cart back to a purchase requisition with procurement categories.**
- **You cannot procure with punchout with products, and you must use purchase requisition.**



# Cepheo Punchout Procurement

Cepheo Punchout Procurement extends on standard External catalog and add new capabilities for punchout with products on purchase requisition and punchout with both products and procurement categories directly from a purchase order.

Capabilities	Standard	Cepheo Punchout Procurement
Punchout from Purchase requisition with Procurement categories	✓	✓
Punchout from Purchase requisition with Products	✗	✓
Punchout from Purchase order with Procurement categories	✗	✓
Punchout from Purchase order with Products	✗	✓

# Flexible setup per external catalog

Select for each external catalog how to use products/items:

- **Item number requirement:** Set mandatory to use items with punchout on purchase requisition and/or purchase order. This to ensure that items are used for selected external catalog.
- **Allow items with no procurement categories:** Set to allow punchout on purchase order with items with no procurement categories. This to be able to use punchout without having to maintain a procurement catalog in addition to the external catalog.

The screenshot displays a configuration interface for an external catalog. The main section is titled "General" and contains the following fields and controls:

- GENERAL**
  - Name: ExternalCatalog
  - Description: ExternalCatalog
- Open new browser window:  No
- Default expiration (Days): 365
- Punchout protocol type: cXML
- CATALOG STATUS: Active  Yes

On the right side, there are two columns of toggle switches, both of which are highlighted with a yellow background:

- USE ITEMS**
  - Use items:  Yes
  - Item number requirement:  Yes
- PURCHASE ORDER**
  - Allow items with no procurem...:  Yes

# Punchout purchase requisition with products

Finance and Operations

Add lines obtained from external catalog site to purchase requisition | Standard view

Validate shopping cart

Please ensure procurement categories on all lines

Purchase requisition: 000331 | Buying legal entity: USSI | Requester: Geir Efteland | Receiving operating unit: | Vendor: ExternalCatalogDummy

Update procurement category | Remove

	Issues	External item num...	Item number	Product name	Procurement category	Quantity	Units	Unit price	Total	Currency
		5506942	S0010	DN 150 ventilkryss 4/4 hø...	PAYROLL	5.00	STK	107,487.38	537,436.90	NOK
	⊗	607241		Bor/skrutrekker GSR 12V-...	UTILITIES	5.00	STK	4,395.30	21,976.50	NOK
	⊗	1042126	S0015	TCX (C) 150/250V 10P0.75		5.00	MTR	123.48	617.40	NOK
	⊗	4200408	S0013	Oras Safira kjøkkenkran 1...		5.00	STK	1,552.32	7,761.60	NOK
✓		3120061		Molde 1901 Grafitt LED. I...	RENT	5.00	STK	3,094.84	15,474.20	NOK

**Match on internal item numbers on vendors external item numbers**

**Warnings if not match on external item number or other issues**

# Punchout purchase requisition with products

Purchase requisitions | 000331 : TEST | Standard view

**000331 : Test** Lines Header Draft

**Purchase requisition header**

**ADMINISTRATION**  
 Purchase requisition: 000331  
 Name: Test  
 Preparer: Geir Efteland  
 Status: Draft  
 Requisition purpose: Consumption

**DATES**  
 Requested date: 4/12/2021  
 Accounting date: 4/12/2021

**BUSINESS JUSTIFICATION**  
 Reason:   
 Details:   
**Lines added from shopping cart with and without item numbers, depending on setup on external catalog**

**Purchase requisition lines**

+ Add line + Add products External catalogs Cancel Remove Purchase requisition line Financials Inventory

Line	Requester	Buying leg...	Receiving operating unit	Item number	Procurement category	Product name	Quantity	Unit	Unit price	Net amount	Currency	Vendor account	Vendor name	Status
1	Geir Efteland	USSI		S0010	PAYROLL	DN 150 ventilkryss 4/4 hør...	5.00	STK	107,487.38	537,436.90	NOK	US_SI_000054	ExternalCatalogDummy	Draft
2	Geir Efteland	USSI			RENT	Molde 1901 Grafitt LED. I...	5.00	STK	3,094.84	15,474.20	NOK	US_SI_000054	ExternalCatalogDummy	Draft

# Punchout on purchase order

The screenshot displays the SAP S/4HANA interface for a purchase order. The breadcrumb navigation shows: Finance and Operations > Procurement and sourcing > Purchase orders > All purchase orders. The main header is "00000605 : US\_SI\_000054 - ExternalCatalogDummy". Below the header, there are sections for "Purchase order header" and "Purchase order lines".

**Purchase order header**

DELIVERY	DISCOUNTS	REPLENISHMENT	CROSS DOCKING DATES
Delivery date 3/29/2021	Total discount % 0.00	Service category	Delivery date 3/29/2021
Earliest confirmed delivery	VENDOR Contact	Location	Cross docking date

**Purchase order lines**

Buttons: + Add line, + Add lines, Add products, **External catalogs**, Remove, Purchase order line, Financials, Inventory, Product and supply

Table columns: T..., Budget ch..., Line number, Item number, Product name, Procurement category, Variant number, CW quantity, CW u...

**External catalogs** (Right-hand pane):

Category search:

Catalog:

ExternalCatalog  
CORP PROCUREMENT CAT...  
[Open in browser](#)

**External catalog on purchase order** (Text with red arrow pointing to the 'External catalogs' button in the purchase order lines)

# Punchout on purchase order

Finance and Operations

Add lines obtained from external catalog site to purchase order | Standard view

Validate shopping cart

Purchase order: 00000605 Vendor: ExternalCatalogDummy

Update procurement category Remove

	Issues	External item num...	Item number	Product name	Procurement category	Quantity	Units	Unit price	Total	Currency
		5506942	S0010	DN 150 ventilkryss 4/4 hø...	PAYROLL	5.00	STK	107,487.38	537,436.90	NOK
	⊗	607241		Bor/skrutrekker GSR 12V-...		5.00	STK	4,395.30	21,976.50	NOK
		1042126	S0015	TCX (C) 150/250V 10PC.75	UTILITIES	5.00	MTR	123.48	617.40	NOK
		4200408	S0013	Oras Safira kjøkkenkran 1...		5.00	STK	1,552.32	7,761.60	NOK
		3120061		Molde 1901 Grafitt LED. I...	RENT	5.00	STK	3,094.84	15,474.20	NOK

**Match on internal item numbers on vendors external item numbers**

**Can also use procurement categories, with or without item numbers**

# Punchout on purchase order

Finance and Operations | Procurement and sourcing > Purchase orders > All purchase orders

Save + New Delete Purchase order Purchase Manage Receive Invoice Retail Warehouse Transportation General Options

Set up Vendor Maintain Related information

Print management Trade agreement Cases Supplementary items Related orders Planned purchase orders Purchase agreement  
Summary Activities Contact details Postings Committed costs Approved to supply  
Line quantity

Purchase order details | Standard view

**00000605 : US\_SI\_000054 - ExternalCatalogDummy**

**Lines added to purchase order from shopping cart**

Purchase order header

DELIVERY: Delivery date 3/29/2021, Earliest confirmed delivery

DISCOUNTS: Total discount % 0.00

VENDOR: Contact

REPLENISHMENT: Service category, Location

CROSS DOCKING DATES: Delivery date 3/29/2021, Cross docking date

Local delivery date, Sales date

Purchase order lines

+ Add line + Add lines Add products External catalogs Remove Purchase order line Financials Inventory Product and supply Update line Work details

	T...	Budget ch...	Line number	Item number	Product name	Procurement category	Variant number	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	D
			1	S0010	Internal product name	PAYROLL				5.00	STK	107,487.38	0.00000	
			2	S0015	Software: Productivity	UTILITIES				5.00	MTR	123.48	0.00000	
			3	S0013	Hardware: DB Server					5.00	STK	1,552.32	0.00000	
			4		Molde 1901 Grafitt LED. I...	RENT				5.00	STK	3,094.84	0.00000	

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