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Automated Business Partner Onboarding Solution: Reducing risk and enhancing efficiency, compliance, and data integrity

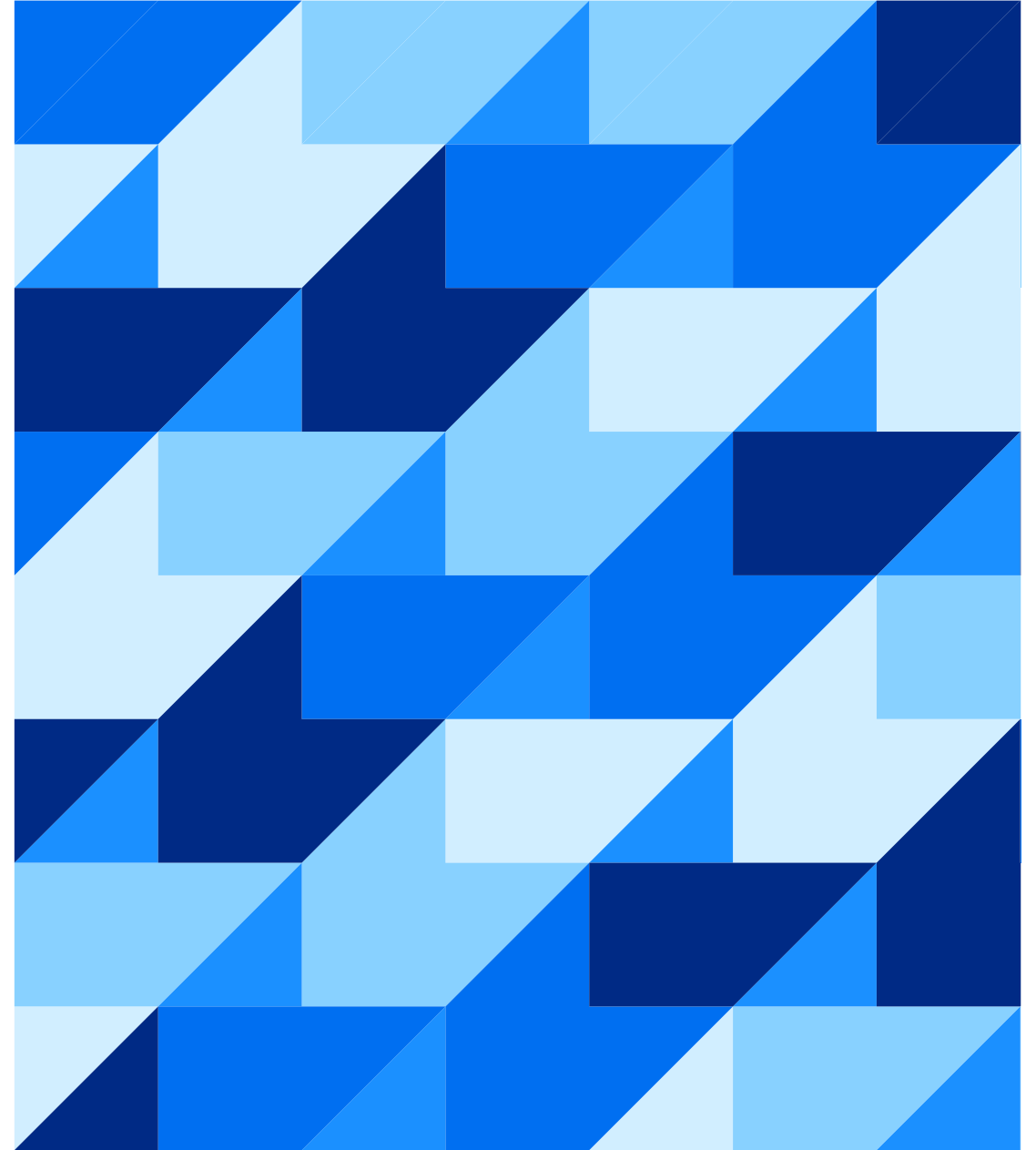
Energy Transfer

Oil and Gas

PUBLIC



Incture[®]



Company information

COMPANY NAME:

Energy Transfer

HEADQUARTERS:

Dallas, TX, USA

INDUSTRY:

Oil and Gas

WEBSITE:

<https://www.energytransfer.com/>

NUMBER OF EMPLOYEES:

10,000+

Energy Transfer is a leading North American energy infrastructure company specializing in the transportation, storage, and distribution of natural gas, crude oil, refined petroleum products, and natural gas liquids (NGLs). Founded in 1996 by Kelcy Warren and Ray Davis, Energy Transfer was established to meet the critical demand for reliable energy infrastructure, enhancing the safe, efficient movement and delivery of energy resources across the United States.

The company's extensive network includes more than 120,000 miles of pipelines and associated infrastructure strategically positioned to serve diverse markets. Energy Transfer's customers span a broad spectrum, including major oil and gas producers, refineries, power plants, industrial facilities, petrochemical companies, and residential consumers.

Energy Transfer exists to provide dependable energy solutions while maximizing operational efficiency and safety. It plays an essential role in ensuring energy security, facilitating economic growth, and supporting communities through job creation and economic contributions.

Committed to operating as an intelligent enterprise, Energy Transfer leverages advanced technologies and analytics to enhance operational efficiency, predict maintenance requirements, optimize resource allocation, and ensure environmental compliance. The company employs digital tools and real-time data monitoring to maintain asset integrity, improve decision-making, and reduce operational risks, thus positioning itself for sustainable growth and responsible environmental stewardship.

Automated Business Partner Onboarding Solution: Reducing Risk and Enhancing Efficiency, Compliance, and Data Integrity



Energy Transfer

CHALLENGE:

Energy Transfer receives a high volume of requests to add new business partners or modify existing ones, creating the need for an efficient process that both serves potential partners promptly and reduces administrative burden for the organization. The Business Partner Support Team seeks an automated solution that manages these requests through a web portal, using dynamic forms tailored to each partner type and allowing attachments for supporting documentation. The portal should validate critical data via third-party APIs and automatically format submissions to align with governance rules. Approval workflows must be triggered based on the requesting user, and once fully authorized, updates should flow directly into SAP to create or modify the relevant business partner records.

SOLUTION:

Energy Transfer has chosen Incture's Cherrywork solution, which runs on the SAP BTP platform and seamlessly integrates with the organization's SAP S/4HANA system. The Cherrywork Onboarding Tool automates the entire process of onboarding new business partners—from initial data capture to final approval—while managing and verifying critical partner information like tax IDs, bank accounts, compliance requirements, and risk assessments. This ensures data accuracy and regulatory compliance, substantially reducing manual work for procurement, finance, and compliance teams and allowing them to focus on higher-value tasks. In addition, the tool streamlines ongoing data maintenance for business partners, including updates or extensions to existing records, and applies duplicate checks, risk assessments, and compliance checks at every step to maintain robust data governance.

OUTCOME:

- Average time from submission to completion for change requests < **2 days**
- Average time from submission to completion for onboarding requests < **4 days**

2,403

Total requests submitted in less than 5 months post go-live

50x

more onboarding requests submitted every month from the previous process.

3 Days

Average time from submission to completion for onboarding requests



New Business Partner Master Data Portal (Cherrywork)

Incture's Cherrywork Business Partner Onboarding solution has helped to improve the efficiency, accuracy, and management of our business partner master data maintenance. This transition has streamlined the creation and maintenance of SAP customer and vendor records. A special thank you to the Incture and ET teams for their efforts in bringing this milestone project to completion.



Michael Miles Lee, Business Partner Support Team



Participating partner information

Incture is a leading provider of digital products, applications and solutions.

Cherrywork® is a suite of digital products and applications powered with AI, delivering business value with agility, security and at scale to address complex requirements of enterprises, while keeping the digital core clean.

Incture's Cherrywork Business Partner Onboarding solution deployed on ET's SAP BTP streamlined and automated the business partner onboarding process.

COMPANY NAME:

Incture LLC



The Incture team worked many late nights to deliver a solution that front loads data validation and eliminates the need to transcribe data from forms into SAP. Their solution allows our master data team to process requests quicker and more accurately. We appreciate their efforts on this transformational project



- Michael Miles Lee,
Business Partner Support Team

Challenges

GLOBAL CHALLENGES

- Increased lead times, production delays, and financial losses
- Poor onboarding processes lead to inefficiencies in identifying alternative suppliers, increasing lead times and costs
- Without proper compliance checks, organizations risk partnering with entities that fail to meet tax, labor, and environmental regulations. Companies fined millions of dollars for failing to conduct proper due diligence on suppliers violating labor laws (e.g., child labor issues in supply chains)

BUSINESS CHALLENGES

- Streamlined manual processes
- Automation needed to standardize processes
- Obtaining full approval for new vendor setup were not consistent
- Data inaccuracy and inconsistent data

Objectives

PROJECT OBJECTIVES

- To enhance the business partner master data maintenance processes
- To improve the efficiency, accuracy, and overall management of business partner master data
- To automate internal workflows and reduce the time required for review and approvals

WHY SAP

The new software will replace the existing Service Now and OpenText Active Community (Vendor Portal) request processes for all matters related to business partner master data creation/maintenance in SAP, effective immediately. As all the actions will be on SAP starting from hosting the application on SAP BTP, using the HANA DB and then storing all the data on SAP

Project or use case

OVERALL USE CASE

The Cherrywork Onboarding Tool automates the end-to-end process of onboarding new business partners, from initial data capture to final approval. It manages and verifies critical business partner information such as tax IDs, bank account details, compliance requirements, and risk assessments ensuring data accuracy and regulatory compliance. This reduces the manual workload on procurement, finance, and compliance teams, allowing them to focus on more strategic tasks. The tool also facilitates ongoing data maintenance, such as updating or extending existing business partner records, and handles duplicate checks, risk assessments, and compliance checks at each step of the onboarding process.

- Intuitive web-based form to fill all the required details to onboard a Business Partner.
- Integrated automated compliance and risk screening as highlighted to enhance the quality of partners that are onboarded.
- Integrated Business Document sign-off feature into the application for seamless experience in getting the W-9 forms signed off for each business partner.
- Integrated an SAP BTP microservices for real time address suggestions and validation.
- Real time 3rd Party API integration for Tax Identification Number validation and Bank validation through Tincheck and PNC Bank.
- Customized KPI reports to capture all the business relevant numbers for better visibility.
- Document management system (DMS) to store all the relevant documents uploaded during lifecycle of the request.
- A combined PDF which has all the field level details of the request along with the documents attached and the audit trail merged into one document which is sent at the end of the process and is automatically stored in the DMS repository.

USE OF ARTIFICIAL INTELLIGENCE IN THE PROJECT

N/A

Benefits and outcomes 1 of 2

BUSINESS OR SOCIAL

- Accelerated Onboarding: Automation-driven workflows eliminate manual intervention, reducing supplier and customer onboarding time from weeks to days
- Enhanced Data Accuracy: Automated data validation (e.g., TINCheck, PNC Bank Verification, SAP MDG integration) minimizes errors and manual corrections, improving data quality and operational efficiency
- Real-Time Data Synchronization: Direct integration with SAP S/4HANA ensures real-time customer and supplier master data updates, reducing discrepancies and enhancing business continuity
- Self-Service Data Management: External customers and vendors can independently create and maintain their data, with automated internal approval workflows reducing administrative overhead while ensuring up-to-date and accurate information

IT*

- Scalable Microservices Architecture: Java-based microservices and React's component-driven UI ensure a highly responsive system with sub-second latency for seamless user interactions
- Cloud-Native Performance: Built on SAP BTP, the solution dynamically scales on demand, allowing ET/SUN to onboard thousands of suppliers and business partners without performance bottlenecks
- Seamless Integration: Directly integrates with SAP S/4HANA, and third-party systems through SAP BTP's Integration Suite, streamlining data flow and operational efficiency
- Enterprise-Grade Security: SAP Identity and Access Management (IAM) enforces role-based access control (RBAC), preventing unauthorized access and ensuring compliance with enterprise security policies

*IT benefits are required if you are using SAP Business Technology Platform offerings

Benefits and outcomes 2 of 2

PEOPLE RELATED: PERSONAL PERSPECTIVE

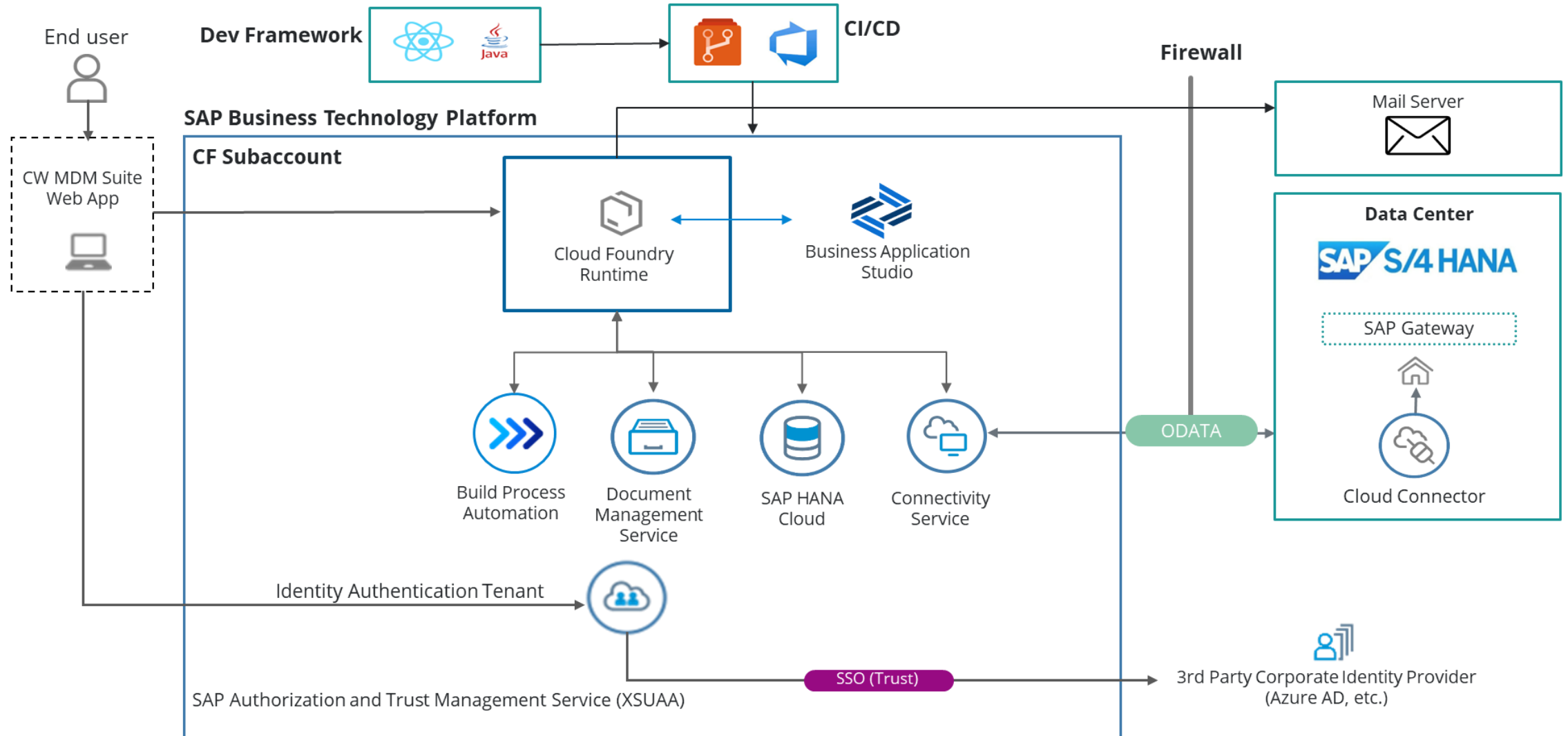
The project has significantly improved efficiency and reduced errors from manual work. The automated workflows have enhanced the ability to ensure that all business partner onboarding approvals are properly captured prior to SAP creation. This implementation provides the opportunity for a more streamlined master data process for the internal and external stakeholders. The user friendly and customer facing features of the Cherrywork application allows for a more collaborative and effective end-to-end workflow.

“

The business partner onboarding workflow has improved significantly by leveraging the automation features of Cherrywork.

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Architecture



Deployment details 1 of 3

SAP TECHNOLOGIES USED

	SAP Offerings	DEPLOYMENT STATUS LIVE Proof of Concept	SAP Business AI SCENARIO (if applicable)	CONTRIBUTION TO PROJECT
1	SAP BTP	Live		SAP Business Technology Platform (SAP BTP) is the backbone of this Business Partner Onboarding solution, enabling scalability, automation, compliance, and real-time SAP integration
2	SAP Integration Suite	Live		SAP Integration Suite plays a crucial role in enabling seamless data exchange, automation, and compliance across multiple SAP and third-party systems in the Business Partner Onboarding solution. It ensures smooth, real-time connectivity between SAP S/4HANA, external APIs, banking systems, tax compliance platforms, and risk management services

DEPLOYMENT STATUS:

Live in Production

DEPLOYMENT COUNTRY:

USA

DATE:

11th November 2024

NUMBER OF END USERS:

1000+

TRANSACTION VOLUME:

1000+ requests per month

Are you using SAP BTP? If YES, move to slide 13

Deployment details 2 of 3

The following SAP Business Technology Platform (SAP BTP) solutions are part of the project:

	TECHNOLOGY	SAP BTP SOLUTION	CONTRIBUTION TO PROJECT
1	Application Development and Automation	SAP Build Apps; SAP Build Process Automation; SAP Build Work Zone; SAP Business Application Studio; SAP Cloud Application Programming Model; SAP BTP; ABAP environment.	<ul style="list-style-type: none"> Enables real-time, event-driven processing for onboarding workflows. Automates and streamlines approval workflows Securely manages external API calls and integrations. Creation and extension facilities.
2	Integration	SAP Integration Suite	<ul style="list-style-type: none"> SAP Integration Suite plays a crucial role in enabling seamless data exchange, automation, and compliance across multiple SAP and third-party systems in the Business Partner Onboarding solution. It ensures smooth, real-time connectivity between SAP S/4HANA, SAP ECC, external APIs, banking systems, tax compliance platforms, and risk management services

*For partners only

***LICENSED THROUGH THE SAP BUILD/TECH ADOPTION PROGRAM:**

Yes

***LISTED ON SAP STORE:**

Yes

***MONETIZED (SOLD TO YOUR CUSTOMERS):**

Yes

***CO-INNOVATION WITH SAP:**

Yes

***NUMBER OF CUSTOMERS USING THE SOLUTION/APP:**

130+

Deployment details 3 of 3

The following offerings from SAP services or application packages were utilized during the implementation or deployment phase.

	SAP SERVICE OR APPLICATION PACKAGE	CONTRIBUTION TO THE PROJECT
1	SAP HANA Cloud	SAP HANA Cloud was used for storing, processing and federating data to run applications within a single cloud solution
2	Business Application Studio	Business Application Studio was used for application development and deployment to Cloud Foundry
3	Cloud Foundry Runtime	The Cloud Foundry Runtime ensures that the Business Partner Onboarding application is highly scalable, secure, and flexible while supporting real-time integration with SAP.
4	Identity Authentication Service	It provides a centralized identity and access management framework that enables secure login, user provisioning, and single sign-on (SSO) across the entire onboarding solution and its connected systems.
5	Build Process Automation	Build process automation was used for handling approval workflows
6	Destination Service	Destination Service acts as a central configuration layer that manages connectivity details, authentication, and protocol handling, simplifying how the onboarding application interacts with backend systems and external services without exposing sensitive connection information.
7	Authorization & Trust Management Service	It acts as the foundation for handling authentication, role-based access control (RBAC), and secure user session management, ensuring that sensitive business partner data is accessible only to authorized users.
8	SAP Connectivity Service	It provides secure access to internal systems via the SAP Cloud Connector and ensures that data exchange follows strict security and performance guidelines.
9	HTML5 Application Repository	the HTML5 Application Repository enables the creation of a responsive and interactive frontend that provides a seamless user experience

Other Packages

 SAP DISCOVERY CENTER MISSION:

Additional information