PRODUCT RELEASE NOTES

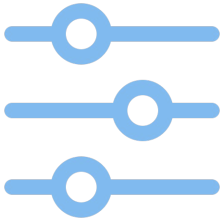
AI Purchase Order Categorization

June 2024

What's New?

In this release, **we introduced AI to categorize purchase order line items** by product/service codes in order to help you refine your results more efficiently.

Overview



Filter

View Results

Export

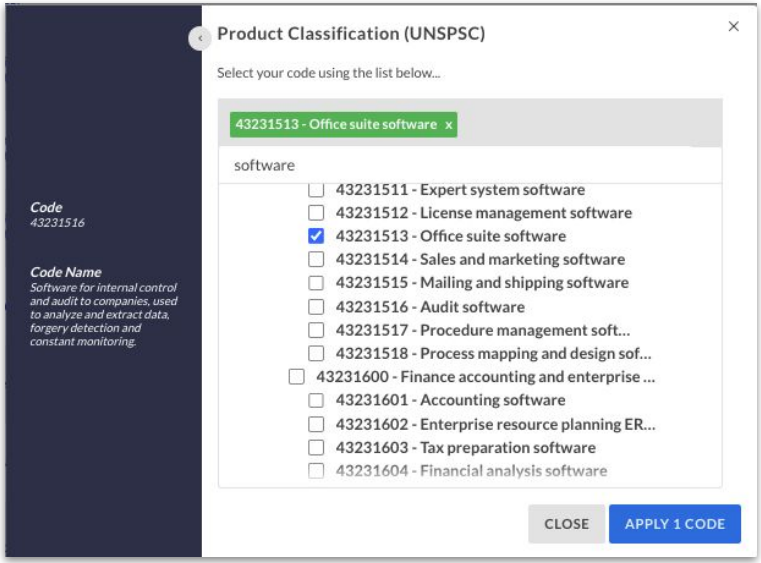
AI Purchase Order Categorization: Overview

Let us help you search more efficiently!

With over 1.4B PO line items in GovSpend, identifying actionable data can often feel like finding a needle in a haystack. We're here to help!

We've introduced AI to categorize and standardize purchase orders using the industry-standard UNSPSC Code system (product/service categorization system). Scrap the complex keyword combinations and get more relevant results with a simple filter!

- ➔ Filter your search results by product/service categories like Software or Office Supplies to get more actionable results using fewer keywords.
- ➔ Easily search and identify relevant categories within the UNSPSC code system via a searchable hierarchy filter
- ➔ View the full hierarchy classification for each line item in your search results and export with the click of a button.

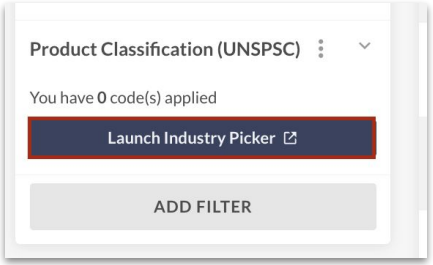


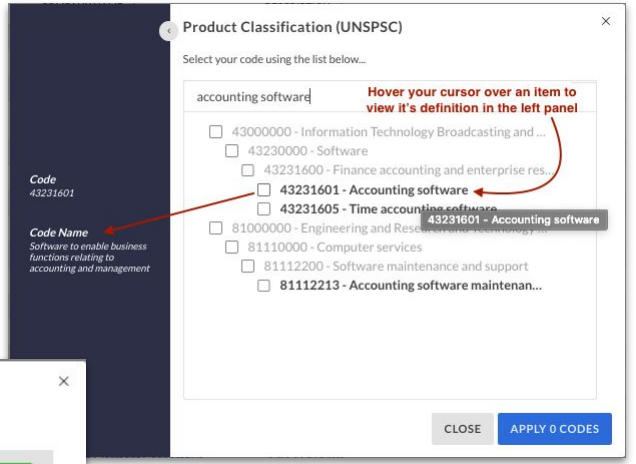
AI Purchase Order Categorization: Filtering

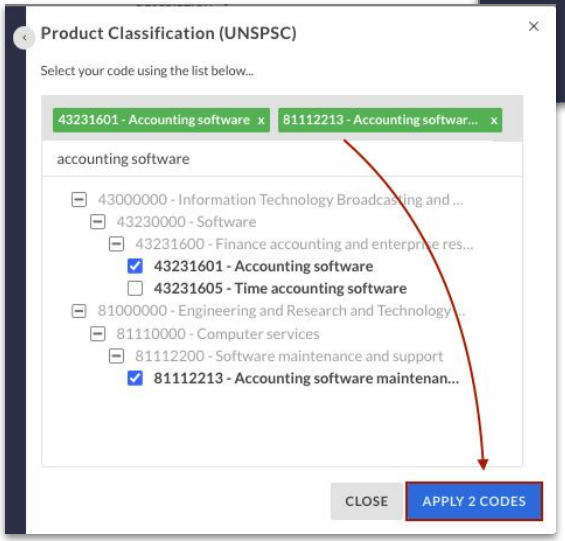
We've added a new type of filter in Spending to allow you to filter using UNSPSC Product/Service codes. Easily understand the hierarchy of codes and find those most relevant to improve your search results.

HOW TO FIND IT

- Navigate to the **Spending Module**
- Find the "**Product Classification (UNSPSC)**" filter at the bottom of your left set of filters
- Click "Launch Industry Picker" to open up the hierarchy of product/service codes for selection
- Use the top search bar in the modal to search for codes related to the product/service you want to search
  - Codes that match your search term will be in bold
- Hover over codes in the hierarchy display to view the code and definition in the left panel of the modal
- Use the check boxes on the left to select codes you want to use for filtering. As you select they will appear as tags at the top of the modal.
- Once you've made your selections, select "**Apply X codes**"
- Click "**Search**" on the main search page to filter your search results





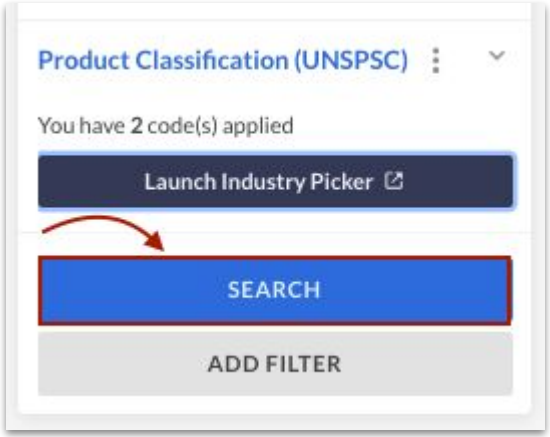


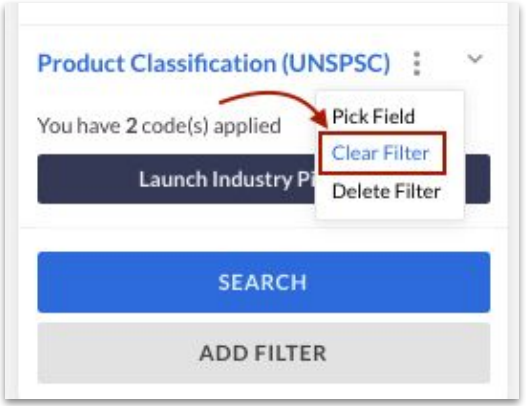
AI Purchase Order Categorization: Search & View Results

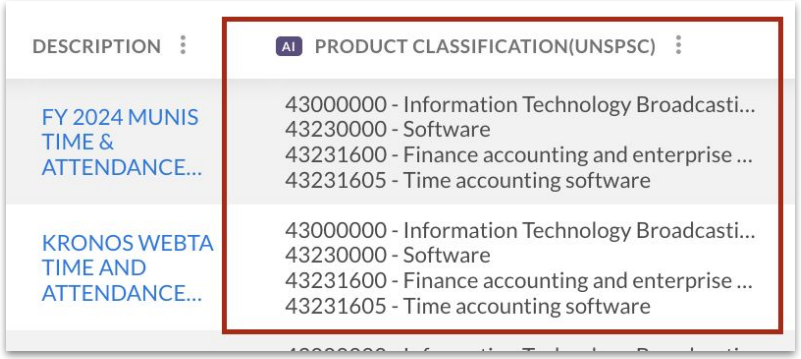
Filter your search based on your selected product/service codes and view the code and code label in the search results table.

HOW TO FIND IT

- ➔ Navigate to the **Spending Module**
- ➔ Make selections within the Product Classification filter as described in the previous slide and "apply"
- ➔ Click the **"Search"** button on the main search page to filter your results by the codes you've selected
- ➔ View all levels of UNSPSC code assigned to each line item, ordered from top level to most granular, via the **"Product Classification (UNSPSC)"** column
- ➔ Adjust other filters to further refine your search
- ➔ Click "Save Search" to save your search
- ➔ To clear the selected Product classification codes, click the 3 dot menu next to the filter name and **"clear filter"**
- ➔ Click "search" to apply those changes





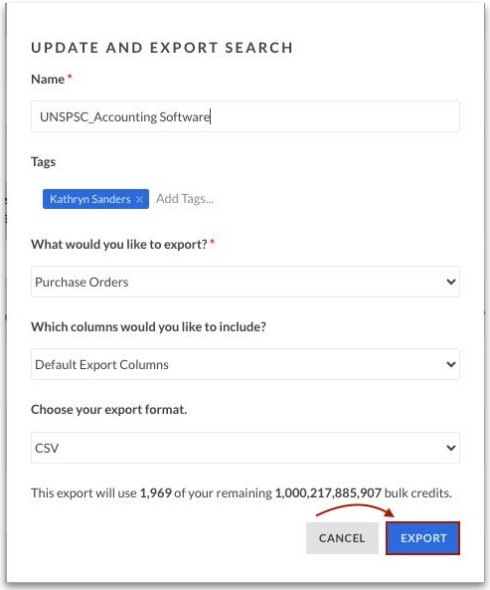


AI Purchase Order Categorization: Export your results

Export the entire hierarchy of product classification codes assigned to each line item in your search results.

HOW TO FIND IT

- Navigate to the **Spending Module**
- Create a search using the Product Classification UNSPSC filter: **Example Search**
- To Export, click the **"Export"** button at the top of the page
- Name your search if you haven't already
- Select to export 'Purchase Orders" and either the "default" or "visible" columns
- Click "**Export**"
- In your export you will see a separate column for each level/code and level/title combination as opposed to one column with all levels combined (as displayed in your search results table)



Separate column for each UNSPSC level/code and level/title combination

Product(UNSPSC) Segment Title	Product(UNSPSC) Segment Code	Product(UNSPSC) Class Title	Product(UNSPSC) Class Code
Information Technology Broadcasting and	43000000	Finance accounting and enterprise res	43231600
Information Technology Broadcasting and	43000000	Finance accounting and enterprise res	43231600
Information Technology Broadcasting and	43000000	Finance accounting and enterprise res	43231600
Information Technology Broadcasting and	43000000	Finance accounting and enterprise res	43231600
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More Information

For more information, check out these helpful resources:

FAQ: UNSPSC FAQ

Guide: Customer Use Cases