

# Create an Operating Procedure

## Create an Operating Procedure

On the home page,

Choose on the folder Customer Credit and Trade by Domains your appropriate domain : [Accounts Receivable](#) or [Credit Management](#) or [Cash Collection](#) or [Customs Trade and Control](#) .

Click on the icon : "create a new operating procedure" and then on the icon at the top of the page : Create and

Choose the template



OtC - Operating procedure  
Template to be used to create operating procedures for the EtE process OtC

A new page with the standard template is created

The screenshot shows a web interface for creating an operating procedure. It includes a 'Page title' field (1), a 'Table of contents' section (3) with a 'Table of contents' button (4), an 'Objective and Scope' section (5), a 'Scope' section (6) with a 'Scope' button (7), an 'Attachments' section (9), and a main content area (10). There are also several icons for selecting regions and ERP systems (8).

1. Enter the title of the page = "ERP (*PI1, PF1, WP1*) - Description of the operating procedure - Region (*APAC, EMEA, LAM, NAM*) - Country (*Optional*) "
2. In this frame (that doesn't appear when the page is saved), there is a short reminder of what should be done when a procedure is created
3. Table of content : by default it takes into account heading 2 & 3 but it can be updated
4. Describe the objective of the procedure
5. Add definitions in the [CMSL - Glossary](#)
6. By default there is one icon by Region. Remove the icon(s) when not applicable. You can also add a country when the procedure is only for one country
7. By default there is one icon by ERP. Remove the icon(s) when not applicable.
8. Add a link to SAP procedures when applicable
9. Add attachments. It can be a link to a document in AODocs, Gdrive or an external link
10. Main content of the procedure
11. Add labels depending the page where you want to classify your OP and following these "rules" :

- o [List of labels to be used in the space CCT](#)

Save

Save your page

12. Assign your document to the appropriate reviewer (the list appears when you click on Assign)



For Review  
Reviewers

Assign →

Add an optional note

Approve Reject Cancel

Next: [Publish the operating procedure](#)

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