Vantive

ServiceNow

Accounts Payable (AP) Service Request Guide

Introduction

ServiceNow is the tool selected by Vantive to engage suppliers and internal users' queries related to the Accounts Payable process.

In the tool, users will be able to create cases, attach documents, and follow up on inquiries regarding invoice status, payments, and other AP queries. Our AP Resolution Teams will be providing responses and solutions to the queries via updates in the cases.

We aim to have an efficient and complete Accounts Payable process, so we appreciate your support following the guidelines below to create and submit your AP queries.

ServiceNow User Guide Purpose

The main purpose of this user guide is to introduce Vantive Suppliers to the general functions and features of the AP ServiceNow process. That is, how Vantive Suppliers can use the SNOW platform to submit a service request.

Important Information for countries in the Americas Region!

Before creating a case, please make sure to register in our Vantive P2P Invoice Portal, our self-service tool where you can consult the status of invoices and payments without the need to create a ticket. This tool is available for invoices billed to UCAN and LATAM countries.

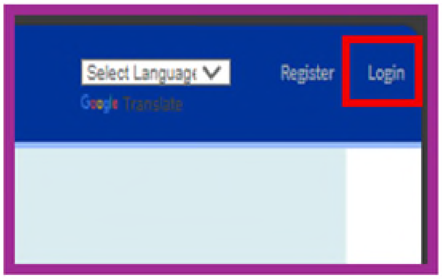
Register and log in into the tool on this address: https://wahcp.baxter.com/aponline/index.html.

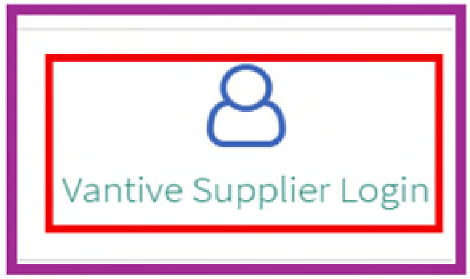
Please make sure to choose '**Vantive**'

To Log in to ServiceNow

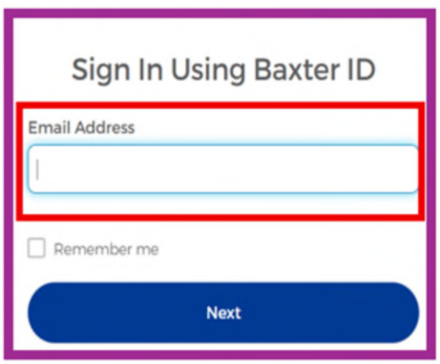
1. Open a browser and go to https://baxter.service-now.com/csm

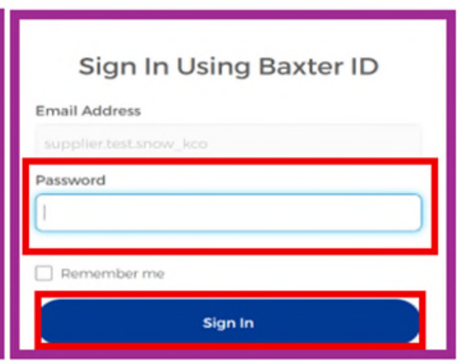
2. On the home page, click ‘**Login**’ and select ‘**Vantive Supplier Login**’





3. Enter your “**Email Address”** and **Password** in the corresponding fields, and then click the **Sign In** button to continue.





4. Click on ‘**Send me the code**’ and you will receive an email with the verification code, enter in the ‘**Verification Code**’ field and click on “**Verify**.”

   Note: Authentication verify depends on supplier choice – (**Okta Verify** - **Google Authenticator, SMS Authentication Voice Call Authentication).**

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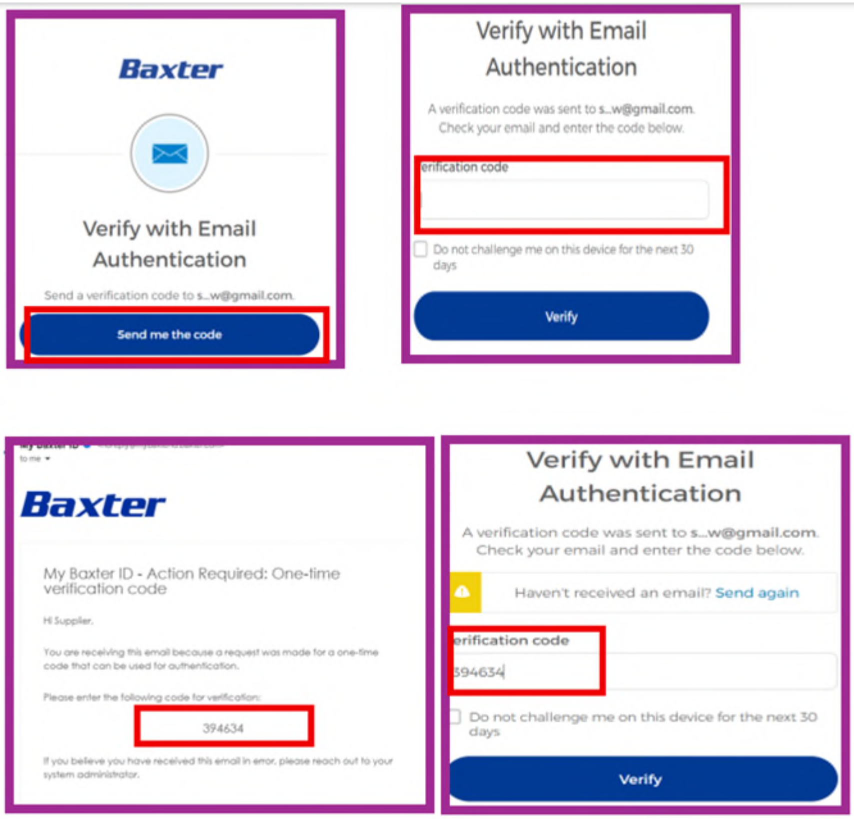
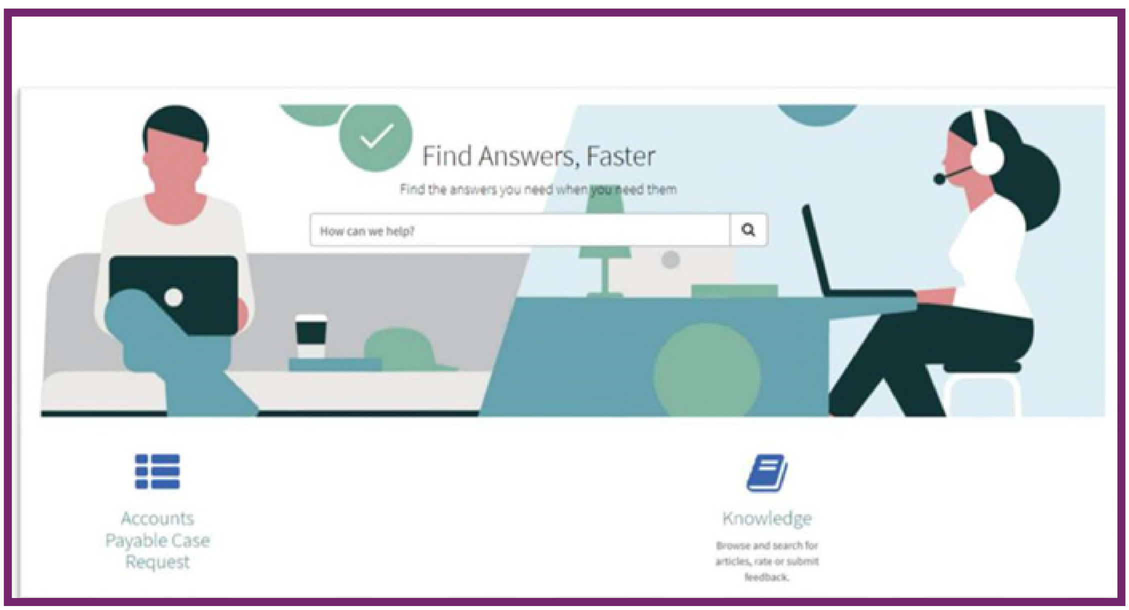


How to create an AP case

1. In the portal home page, click on Accounts Payable Case Request.



2. Complete the fields in the Create Case Form. The fields are the ones below:

a) **Category**: The main type of query you are raising into the Portal. Options are Invoice/Payment Queries and Vendor Master

b) **Subcategory**: This will define your type of query as a more specific topic.

c) **Region**: The Vantive region you are billing to. Please note Vantive is defined by four regions: North America (UCAN), Latin America (LATAM), Europe, Africa, and Middle East (EMEA) and Asia Pacific (APAC)

d) **Country**: The country where the Vantive facility you are billing is located

e) **Supplier Name**

f) **Supplier number:** This is the record number used by Vantive to identify suppliers. It is composed of 8 digits. (this is not mandatory, complete only if you know it)

g) **Subject:** A brief description of the issue

h) **Description**: A more detailed description of your issue/request

i) **Tax Identification Number**

j) **PO number** (if you have it)

k) **Invoice number** (if you have it)

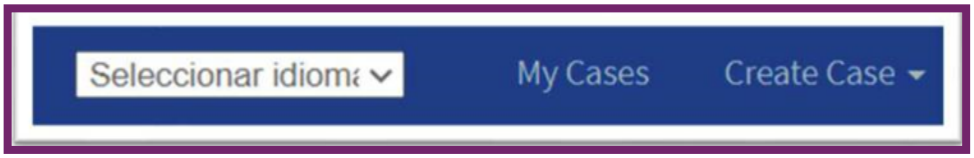
l) **Verification check box.** This will prompt you to use first the Vantive Invoice Portal, a separate self-service tool where you can check the invoice and payment information. This only applies to Americas and some subcategories.

m) **Urgent check box**. **Please note** this is for critical cases only. You will be prompted to justify the urgency of the case if this is marked.

n) **Attachments:** please add support documentation for your case.

3. Once the form is completed, click on Submit. This will assign a new case number. Please keep this number for future references.

4. You can also review the progress of your cases by clicking on the "My Cases" option in the menu on the top of the page:



5. Once you open a case, you can add further comments and attachments if needed, even when no updates have been provided by one of our agents, in the "My Cases" section. You can even close your own case using the Actions button if you feel the answer is no longer required. Activity for the ticket is also visible in this section.

6. Once a case is marked as "Solution Proposed," you can click in the Actions button and confirm if you Accept or Reject the solution provided by the agent.

Notifications for your cases

Every time you create a case, you will receive notifications from status changes in the email you have registered. Please consider that some of these notifications will have relevant updates for your case.

Case creation

A notification is sent with the ticket number and the subject of the case.

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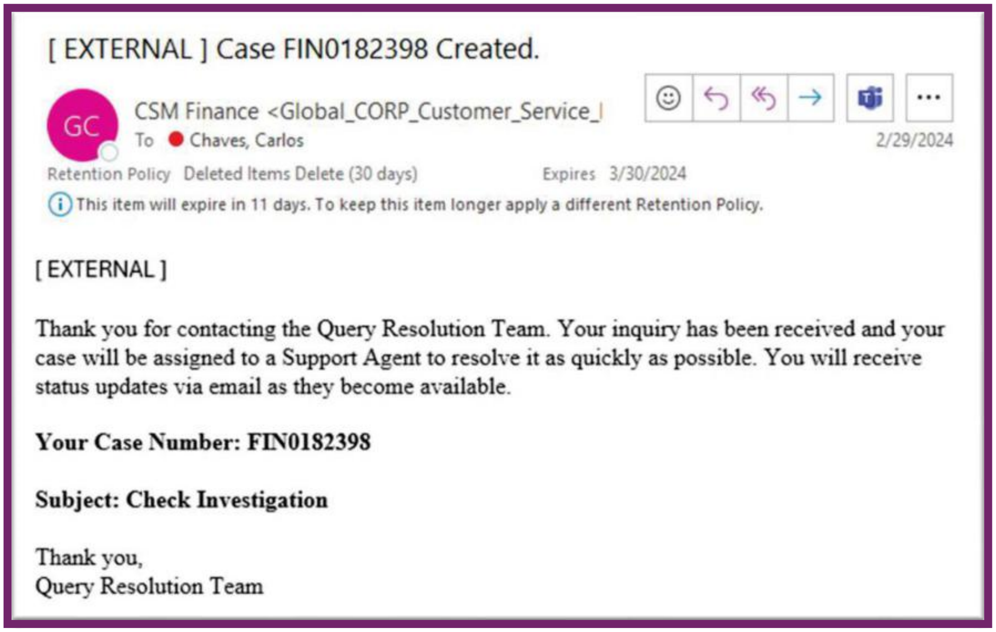

[EXTERNAL] Case FIN0182398 Created.

GC CSM Finance <Global_CORP_Customer_Service_|
To Chaves, Carlos
2/29/2024
Retention Policy Deleted Items Delete (30 days) Expires 3/30/2024
This item will expire in 11 days. To keep this item longer apply a different Retention Policy.

[EXTERNAL]

Thank you for contacting the Query Resolution Team. Your inquiry has been received and your case will be assigned to a Support Agent to resolve it as quickly as possible. You will receive status updates via email as they become available.

Your Case Number: FIN0182398

Subject: Check Investigation

Thank you,
Query Resolution Team

<u>Comments added to your case by agents.</u>

Any comment added by the AP Resolution agents will be added to the case and will trigger an email notification with the relevant comments. These comments can be proposing a solution, giving status, providing data on the case, or even requesting the user that they opened the ticket to provide additional information so the case can be solved.

Your comments will be added if you go to “My Cases” section in the portal and add the required information. This will automatically change the status of the ticket back to the agent.


[EXTERNAL] Case FIN0182398 comments added

GC CSM Finance <Global_CORP_Customer_Service_|
To Chaves, Carlos
Tue 3/1
Retention Policy Deleted Items Delete (30 days) Expires 4/11/2024
This item will expire in 23 days. To keep this item longer apply a different Retention Policy.

[EXTERNAL]

Your Case Number: FIN0182398
Category: Invoice/Payment Queries
Subcategory: Invoice/Payment Status
Short Description: Check Investigation
Priority: 1 - Critical

When logged into Service Now, go to My Cases to see this ticket

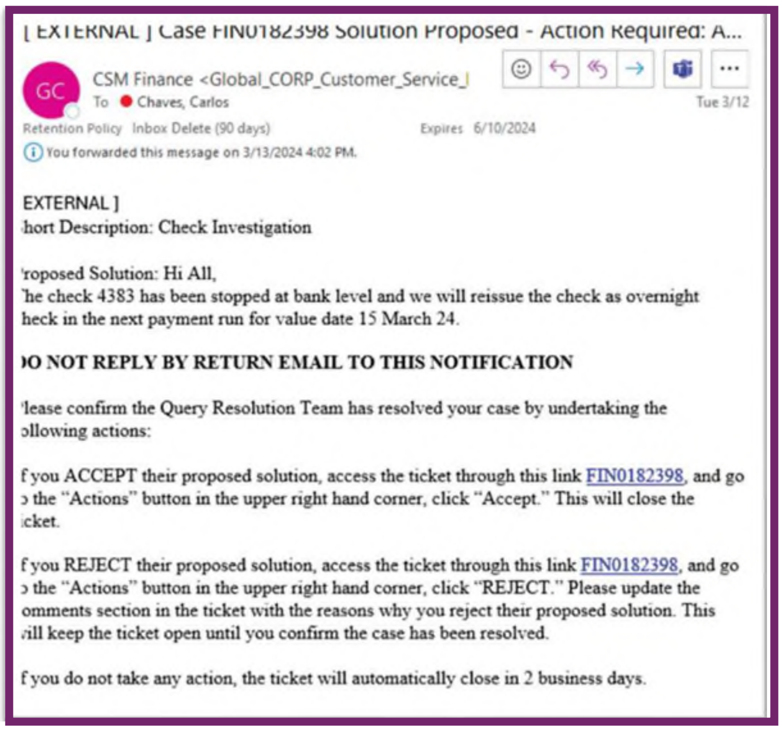
Comments:

03/12/2024 10:08:07 CDT - Agent
I have updated information on the case

Solution proposed for the case

When the AP Resolution Team has completed your case, they will send a proposal for the solution in the case. At this point, the ticket remains open. Please review the solution and either accept the solution, if everything is ok, or reject it in case the solution is not clear or has missing data.

Please note that you need to take action within 2 business days, otherwise the ticket will be automatically closed and if anything, else is required, you will need to open a new ticket.



[EXTERNAL] Case FIN0182398 Solution Proposed - Action Required: A...

GC CSM Finance <Global_CORP_Customer_Service_|

To Chaves, Carlos

Tue 3/12

Retention Policy Inbox Delete (90 days) Expires 6/10/2024

You forwarded this message on 3/13/2024 4:02 PM.

EXTERNAL]

hort Description: Check Investigation

'roposed Solution: Hi All,
'he check 4383 has been stopped at bank level and we will reissue the check as overnight heck in the next payment run for value date 15 March 24.

)O NOT REPLY BY RETURN EMAIL TO THIS NOTIFICATION

'lease confirm the Query Resolution Team has resolved your case by undertaking the ollowing actions:

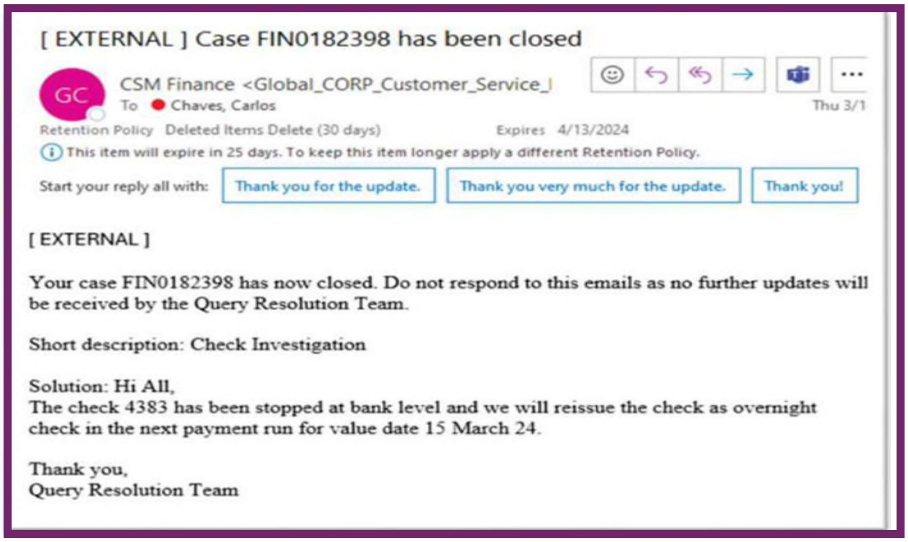
f you ACCEPT their proposed solution, access the ticket through this link FIN0182398, and go the "Actions" button in the upper right hand corner, click "Accept." This will close the icket.

f you REJECT their proposed solution, access the ticket through this link FIN0182398, and go the "Actions" button in the upper right hand corner, click "REJECT." Please update the omments section in the ticket with the reasons why you reject their proposed solution. This vill keep the ticket open until you confirm the case has been resolved.

f you do not take any action, the ticket will automatically close in 2 business days.

The case is closed.

After 2 business days of having the Solution Proposed status, the ticket will be automatically closed. You will receive another notification when this happens, with a short description and the solution to the case. After this point, the ticket cannot be opened again.



[EXTERNAL] Case FIN0182398 has been closed

GC CSM Finance <Global_CORP_Customer_Service_I
To Chaves, Carlos
Thu 3/1

Retention Policy Deleted Items Delete (30 days) Expires 4/13/2024

This item will expire in 25 days. To keep this item longer apply a different Retention Policy.

Start your reply all with: Thank you for the update. Thank you very much for the update. Thank you!

[EXTERNAL]

Your case FIN0182398 has now closed. Do not respond to this emails as no further updates will be received by the Query Resolution Team.

Short description: Check Investigation

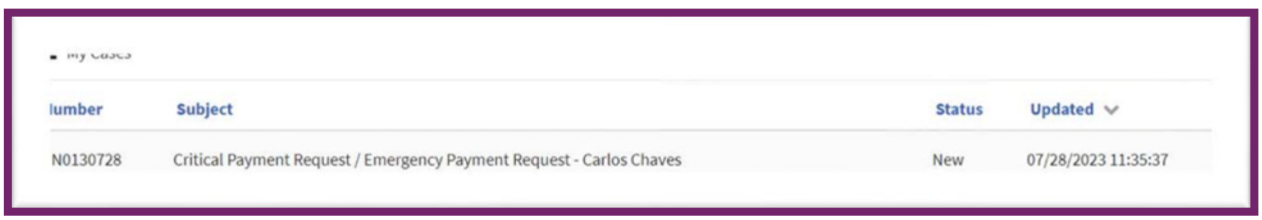
Solution: Hi All,
The check 4383 has been stopped at bank level and we will reissue the check as overnight check in the next payment run for value date 15 March 24.

Thank you,
Query Resolution Team

Escalation of the ticket:

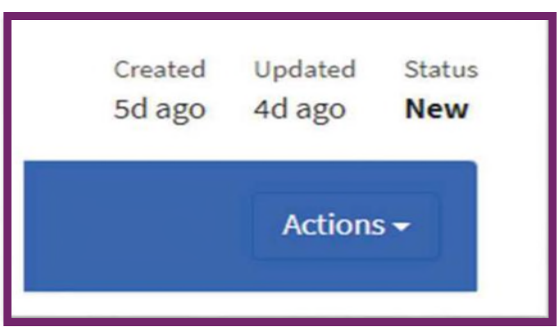
Tickets can be escalated after 7 days of creation date in the tool. Go to "My Cases" section and locate the ticket.

Search for the case created. You can review the latest creation and update date in the ticket.

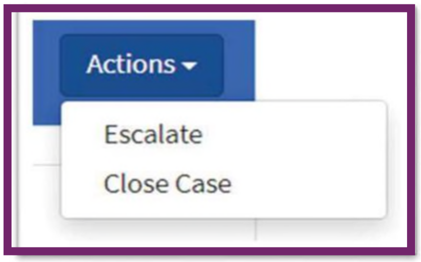


lumber	Subject	Status	Updated
N0130728	Critical Payment Request / Emergency Payment Request - Carlos Chaves	New	07/28/2023 11:35:37

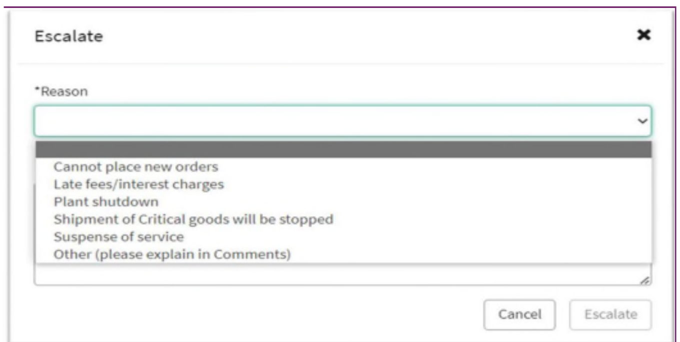
In the top right corner, you will see the Actions button.



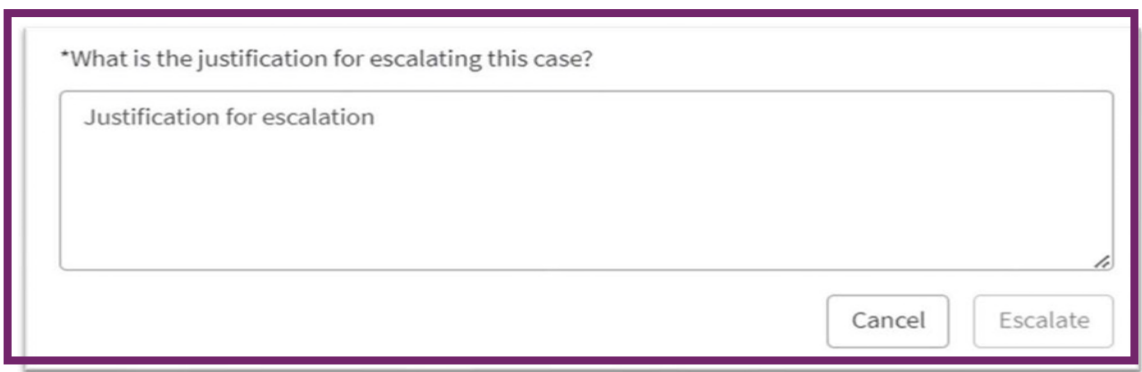
Click on Actions and the “Escalate” option should be available.



You will need to select an escalation reason from the dropdown list.



You will also need to provide your escalation comments in the blank space below the reason.



Once the ticket has been escalated, you will see the latest update in the case created under an ESC case type. This escalation will remain open until the ticket is closed.