SCE Service Center of Excellence

ServiceNow for Fulfillers Pay Invoice

All Pay Invoice request are processed and tracked in ServiceNow. To access the ServiceNow fulfiller portal go to https://uncch.service-now.com

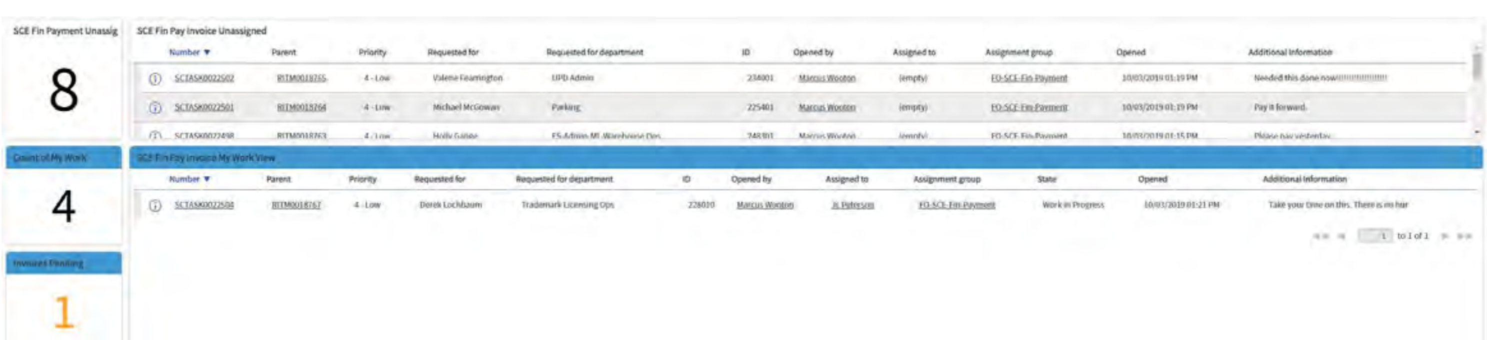
Reviewing Requests

All requests will come into ServiceNow as unassigned. To review unassigned and assigned requests follow the steps below.

- Open ServiceNow Fulfiller portal
- Login with ONYEN and password
- Using Duo Two Step Authentication to complete login (first time daily)
- Review unassigned requests in the **"Unassigned Voucher Group Work"** section
- Your assigned requests will be displayed in the **"My Work Vouchers"** section in any of the following ways:
  - Assigned requests to you by you
  - Assigned requests to you by our team members
  - Assigned requests to you by anyone outside of our team

Assigning Requests

- Review unassigned requests in the **"Unassigned Voucher Group Work"** section
- Assign any requests from customers for whom you are responsible:
  - Double click in the **"Assigned To"** field for the associated Task
  - In the Search box that appears, type the name to assign (i.e. John Doe)
  - Click on the correct name that appear in the list under the box
  - Click on the green Check Mark to save the change
- Review the Request Item to check if this request is a Capital Business Office Request. If this is a Capital Business Office Request reassign the **Task** to the **CBO** group.
- Review the **"Additional Information"** column for customer directed importance
- If priority change is needed:
  - Double click in the **"Priority"** field for the associated Task
  - Using the drop-down box that appears, choose the appropriate Priority to match Customer Request
  - Click on the green Check Mark to save the change
- Once done, click on the **Refresh button in your browser** to refresh the whole page
- The Task will now move from Unassigned to the Correct Assigned list(s)



To view a list of unassigned tasks click the number [8]. To view a list of your assigned tasks click the number [4].

Processing Invoices

- Navigate to Team Dashboard (if not loaded on dashboard)
- Review all requests (previous section)
- Go to the **"My Work Vouchers"** section to process request(s) in order of importance
- Click on the link in the **"Parent"** column to open the Request Item (**RITM#####**)
- Change the Request Item State to **"Work in Progress"**
  - At the top on the right hand side of the header click **"State"**
  - From the drop-down box, choose **"Work in Progress"**
  - Click on the Hamburger menu in the upper left to select save.
  - If there is ever a problem with an invoice (i.e. No PO, PO needs new line, IC needs approval, etc), the Request Item **"State"** should be changed to **"Pending"**
- Review the **"Additional Information"** from Customer that could affect invoice processing
- If a priority change is needed:
  - Double click in the **"Priority"** field for the associated Task
  - Using the drop-down box that appears, choose the appropriate Priority to match Customer Request
  - Click on the green Check Mark to save the change
- Review the **"Account Information"** section for Chartfield String for the invoice
- At the top, in the **"Manage Attachments"** heading, click on the name of the attachment and open the document
- If Request has additional supporting documentation, open all documents as well

Submitted Invoices (pdf)

- Review the Invoice information
- If attachment contains multiple invoices, see Manager
- Save invoice and any needed documentation on Desktop

In Connect Carolina

- Login to Connect Carolina in a new window
  - This will allow ServiceNow and Connect Carolina to both be visible
- Using open invoice and Chartfield String from ServiceNow Customer's Request, create and submit voucher in Connect Carolina
  - If PO, create receipt and submit invoice through VISP (Vendor Invoice Submission Page)
- **In ServiceNow**, record Voucher Number and/or PO Number in the designated field(s) in the Request Item

Closing Requests

- In the Request Item, in the **Additional Comments (Customer visible)** field, type "[Vendor] Invoice [Invoice #] has been submitted.
- Click the **Post** button under this field.
- At the bottom of the Request Item, find the SCTASK for the request in the Catalog Tasks box
- Double click in the **"State"** field
- From the drop-down box, choose **"Closed-Complete"**
- Click on the green Check Mark to save the change
- Click on the Old Well logo in the top left to navigate back to the Dashboard

On your Desktop

- Delete submitted invoice and any documentation from your Desktop. The attachments in ServiceNow should never be removed/deleted from the request.