

ServiceNow (SNOW) User Guide for Accounts Payable

Procure to Pay Query Resolution

Introduction

ServiceNow is an online service request system used by Vantive to connect with and support internal users and suppliers who may have service requests or questions relating to procurement processes and activities. This tool allows users to create cases, track service requests, attach documents, and resolve issues with the procurement team.

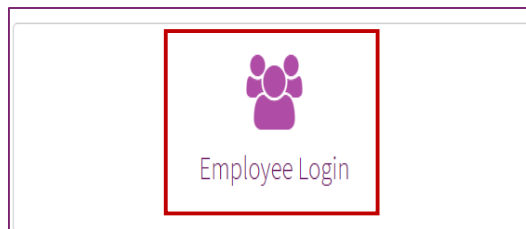
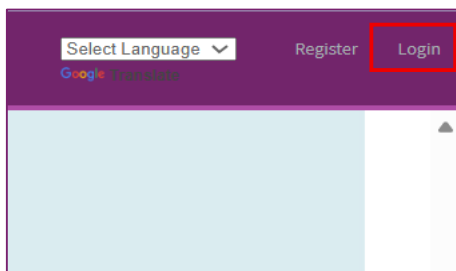
This user guide provides an overview of the ServiceNow user interface and covers how to report an issue, request a service, check the status of a service request, approve or reject a request.

ServiceNow User Guide Purpose

The main purpose of this user guide is to introduce Vantive users to the general functions and features of the Procure to Pay ServiceNow process. That is, how Vantive employees can use the SNOW platform to submit service requests.

To Log on to ServiceNow

1. Open a browser and go to <https://vantive.service-now.com/csm>
2. In the home page, click on '**Login**' and select '**Employee Login**'



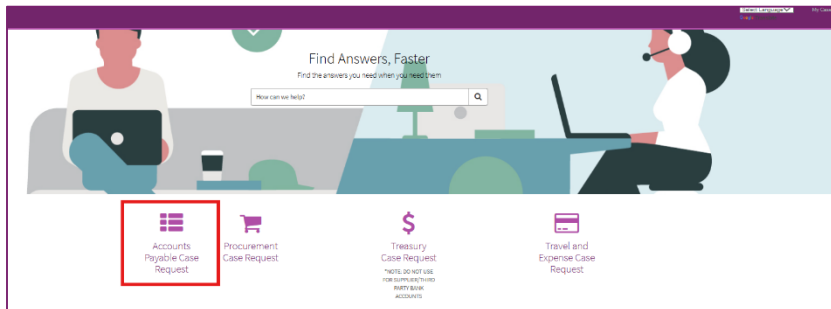


3. On the ServiceNow Login Page, enter your “**Vantive Email ID**” and “**Vantive Password**” in the corresponding fields, and then click the “**NEXT**” button.

The screenshot shows the Vantive login interface. At the top is the Vantive logo. Below it is the heading "Sign in with Vantive". Underneath is the "Vantive Username" label, followed by the instruction "Enter your Vantive User Principal Name (similar to email address)". A text input field contains the example email "XYZ@vantive.com". Below the input field is a checkbox labeled "Keep me signed in". At the bottom is a large purple button labeled "Next".

How to create a Service Request

1. Click “**Accounts Payable Case Request.**”



This will open the ServiceNow intake form - the requestor name will automatically populate in the default “**Requested For**” field.



Home > Create Accounts Payable Case

Create Accounts Payable Case

P2P Case Record Producer - Create Case Catalog Item

To create a case, please complete all required fields and provide information for optional fields, as appropriate, then submit

* Indicates required

* Requested for

* Category

* Sub Category

* Region

Supplier Name

Supplier #

Vat or Tax ID

Do you have a PO number?

☐ Yes

☒ No

Note: If you are opening a service request on behalf of another employee, you should remove your name and add theirs.

To complete the service request, finish by entering the required information below. Add attachments if required.

Home > Create Accounts Payable Case

Create Accounts Payable Case

P2P Case Record Producer - Create Case Catalog Item

To create a case, please complete all required fields and provide information for optional fields, as appropriate, then submit

* Indicates required

* Requested for

* Category

* Sub Category

* Region

Supplier Name

Supplier #

Vat or Tax ID

Do you have a PO number?

☐ Yes

☒ No

Requested For: This is the field to enter the name of the person who wants the service request. It can be you or someone else in the Vantive organization.

Category: This field describes the main area in which your issue or question needs to be addressed.

Subcategory: This field allows you to narrow down the topic in which you will need support.



Region: Select the region where the requestor is based. There are four Vantive regions to choose from: North America (UCAN), Latin America (LATAM), Europe, Africa, and Middle East (EMEA) and Asia Pacific (APAC).

Country: Select the country where the requester is located.

Subject: Enter a brief description of the issue or question the requestor has.

Description: Use the description field to add a more detailed explanation of what is needed and problems that need to be resolved.

Best Practice: When writing a brief description, it is important to be clear and concise while providing enough information to convey the necessary details. Be specific, use direct language, include relevant details about the issue, and avoid non-value details that can distract the responder from the root problem you want solved.

Attachments: Sometimes, supporting documentation is required. Use the “**paperclip**” icon to ‘**Add attachments**’ to the service request. Documents that might be added may include screenshots, letters, emails or other information a responder may need to solve your issue. To add the attachment, choose the file from your computer, drag and drop the file from your desktop or copy and paste it. The file will then be attached to service request.

Note: Not every submission requires an attachment.

Submit: Once all fields are completed in the intake form, click ‘**Submit.**’

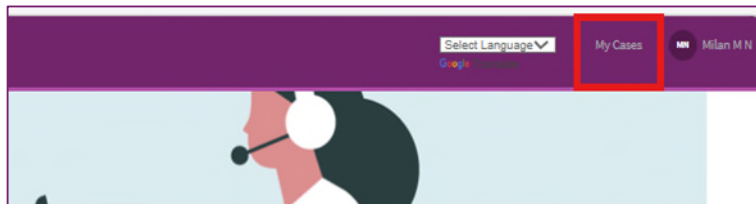
After clicking submit, a **Service Request case number** is generated. All case numbers generated by CSM will start with “**FIN**” and emails generated from the CSM portal come from “CSM Finance.”

A screenshot of the Vantive CSM portal interface. The top navigation bar shows 'Home' and 'My Request - FIN0334249'. Below this, a table header displays 'Number', 'Created just now', 'Updated just now', and 'Status New'. The main content area has a purple header with the word 'Test' and an 'Actions' dropdown. Below the header, there are tabs for 'Activity', 'Additional Details', and 'Attachments'. The 'Activity' tab is active, showing a rich text editor with a toolbar containing bold, italic, underline, font color, background color, bulleted list, numbered list, link, and unlink icons. The text area is empty, and a 'Send' button is located at the bottom right of the editor.

Note: Attachments are part of the service request once added. Always double check the file before submitting to ensure the correct file has been added. Also, when starting a new service request from a previous, unsubmitted intake form, be sure to remove any old attachments before submission.

How to track a Service Request

1. To track the **Service Request**, click on ServiceNow home page and click on “**My Cases.**”



2. Select the Service Request you want to track by clicking on the Service Request.

The screenshot displays the 'My Cases' table. The first row is highlighted with a red box. The table has columns for Number, Subject, Status, and Updated.

Number	Subject	Status	Updated
FIN0334249	Test	New	05/14/2026 13:01:41
FIN0334223	Test - GQ - Process improvements	Solution Proposed	05/14/2026 02:06:34
FIN0334222	Test-GQ- How do I ?	Open	05/14/2026 02:05:31
FIN0334220	Test-General Queries	New	05/14/2026 02:04:04
FIN0334217	Coupa-Receipt reversal	Solution Proposed	05/14/2026 02:01:15

3. You will see the details and status of the Service Request.

The screenshot shows the details page for the service request 'FIN0334249'. The subject 'Test' is highlighted with a red box. The page includes a rich text editor for the description and a 'Send' button.

Number: FIN0334249
Created: 38m ago
Updated: 38m ago
Status: New

Test

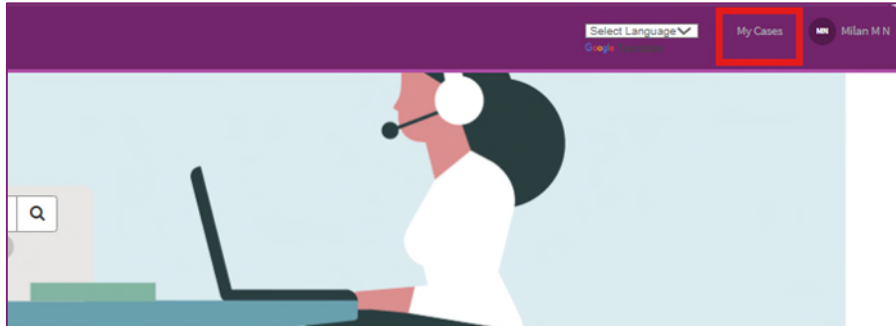
Activity Additional Details Attachments

Agent: FIN0334249 Created 38m ago

Start

How to update a Service Request

1. To update the Service Request, click on ServiceNow home page and click on **“My Cases.”**



2. Select the Service Request you want to update by clicking on the Service Request.

Home > My Cases

Search

My Cases View Open Cases

Number	Subject	Status	Updated
FIN0334249	Test	New	05/14/2026 13:01:41
FIN0334223	Test - GQ - Process improvements	Solution Proposed	05/14/2026 02:06:34
FIN0334222	Test-GQ- How do I ?	Open	05/14/2026 02:05:31
FIN0334220	Test-General Queries	New	05/14/2026 02:04:04
FIN0334217	Coupa-Receipt reversal	Solution Proposed	05/14/2026 02:01:15

< 1 2 3 > Rows 1 - 5 of 14

3. Enter the details into the text box and if you want to add an attachment then click on **attachments**, upload, and **send**.

Home > My Request - FIN0334249

Number: FIN0334249 Created: about an hour ago Updated: about an hour ago Status: New

Test Actions

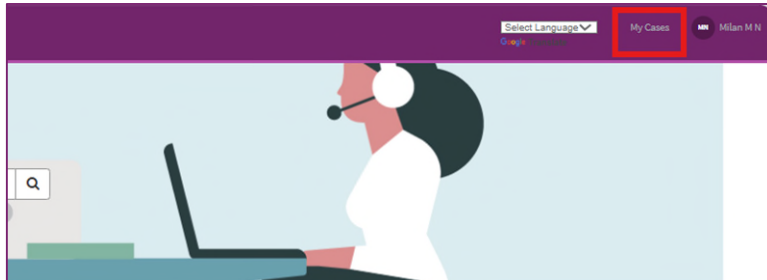
Activity Additional Details Attachments

Rich text editor with toolbar (B, I, U, System Font, etc.) and a Send button.

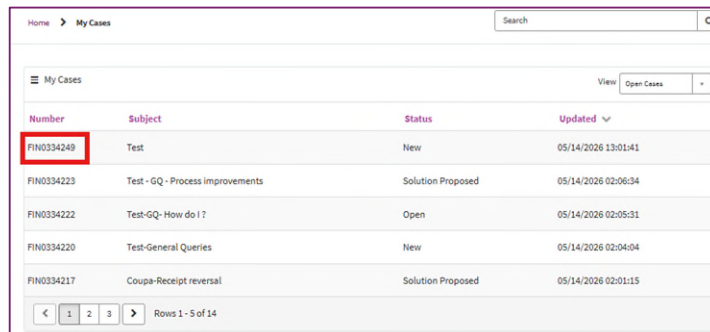
Agent: about an hour ago

How to escalate a Service Request

1. To escalate the Service request, click on ServiceNow home page and click on “**My Cases.**”



2. Select the Service request you want to escalate by clicking on the Service request



Number	Subject	Status	Updated
FIN0334249	Test	New	05/14/2026 13:01:41
FIN0334223	Test - GQ - Process improvements	Solution Proposed	05/14/2026 02:06:34
FIN0334222	Test-GQ- How do I ?	Open	05/14/2026 02:05:31
FIN0334220	Test-General Queries	New	05/14/2026 02:04:04
FIN0334217	Coupa-Receipt reversal	Solution Proposed	05/14/2026 02:01:15

3. Click “**Actions**” and select “**Escalate**”



Click on “**Reason**” drop down and select the **Reason type** and provide the “**Justification for escalation**” and click on “**Escalate.**”

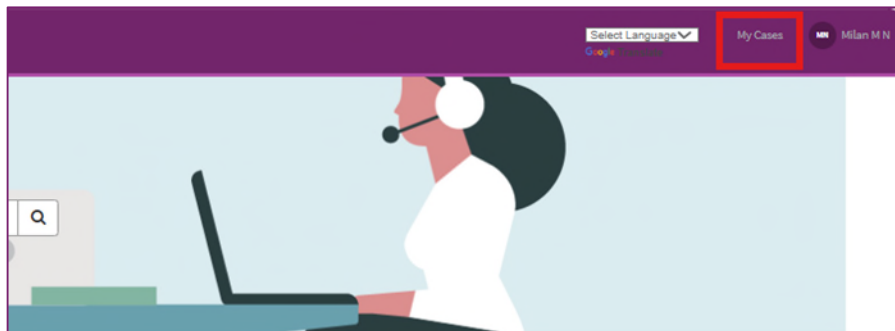
Note: The ticket can be escalated only after 2 days of creation

How to accept or reject a proposal

Once the agent has actioned the Service request and proposed a solution, user will receive an automated email.

Users can either click the link as provided in the email or follow the navigation steps outlined in the below.

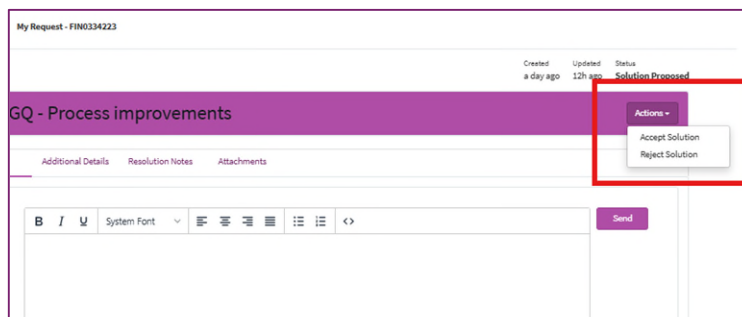
1. To **Accept** or **Reject** the Service request, click on ServiceNow home page and click on **"My Cases."**



2. Select the Service request you want to **Accept OR Reject** by clicking on the Service request.

Number	Subject	Status	Updated
FIN0334249	Test	New	05/14/2026 13:01:41
FIN0334223	Test - GQ - Process improvements	Solution Proposed	05/14/2026 02:06:34
FIN0334222	Test-GQ- How do I ?	Open	05/14/2026 02:05:31
FIN0334220	Test-General Queries	New	05/14/2026 02:04:04
FIN0334217	Coupa-Receipt reversal	Solution Proposed	05/14/2026 02:01:15

3. Check and confirm the Service Request has been resolved by Selecting **"Accept Solution"** your Service Request will be closed.



4. If the requested issue is not resolved, select “**Reject Solution**”, your Service Request will be re-opened.

The screenshot displays the Vantive Service Request interface. At the top, it shows 'My Request - FIN0334223'. Below this, there are tabs for 'Created a day ago', 'Updated 12h ago', and 'Solution Proposed'. The main content area is titled 'GQ - Process improvements'. On the right side, there is an 'Actions' dropdown menu with options 'Accept Solution' and 'Reject Solution'. The 'Reject Solution' option is highlighted with a red box. Below the main content area, there is a rich text editor with a toolbar containing bold, italic, underline, and font color options, along with a 'Send' button.