# PROCESS GUIDE

# EXTERNAL SUPPLIER – AP & VM HELP CENTER

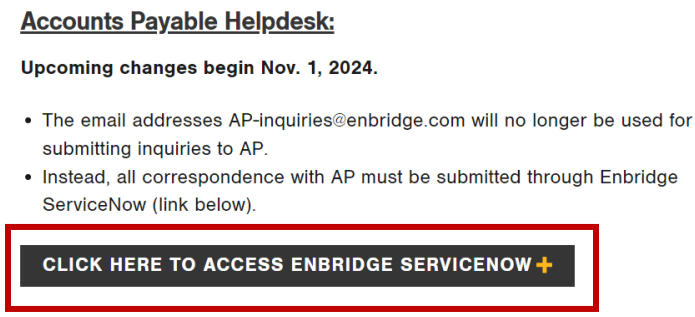
Training Material

Fall 2024

# Contents

## 1 NAVIGATE TO ACCOUNTS PAYABLE HELPDESK

1. Navigate to [Current suppliers: Tools and resources - Enbridge Inc.](#).
2. Scroll to the Accounts Payable Helpdesk section. To Submit inquiries to Accounts Payable (AP), click the button *Click Here to Access Enbridge ServiceNow.*




3. You will see the Accounts Payable and Vendor Master Help Center welcome message. Select *Supplier*.

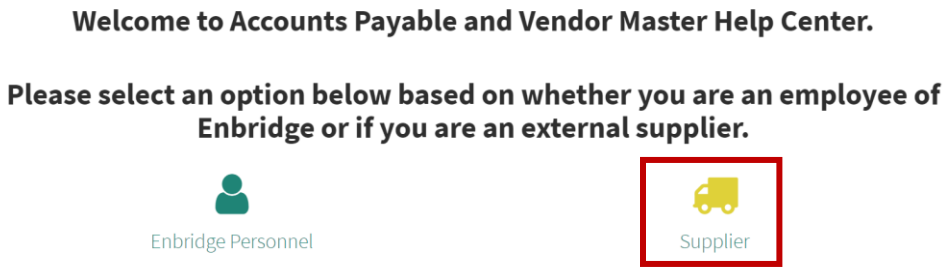



*Figure 1. Welcome Page*

## 2 REGISTER A NEW SUPPLIER USER ACCOUNT

4. If you are a new user of this platform, you will need to create an account with Enbridge. On the Sign-In page, at the bottom, click *Sign Up*.

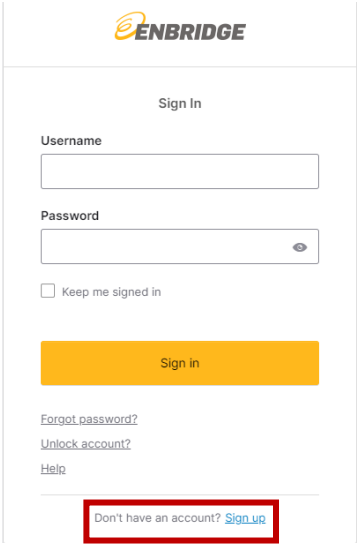



*Figure 2. Sign In Page*

5. Fill-in your *First name*, *Last name*, an *Email* you have access to for verification purposes, *Organization (company name)*, *Primary phone – Optional, Title (role in company) – Optional* and *Password* following the requirements. Click *Sign Up*.

   **Reminder:** Credentials that are being created here, are only to be used for the Accounts Payable and Vendor Master Help Center.

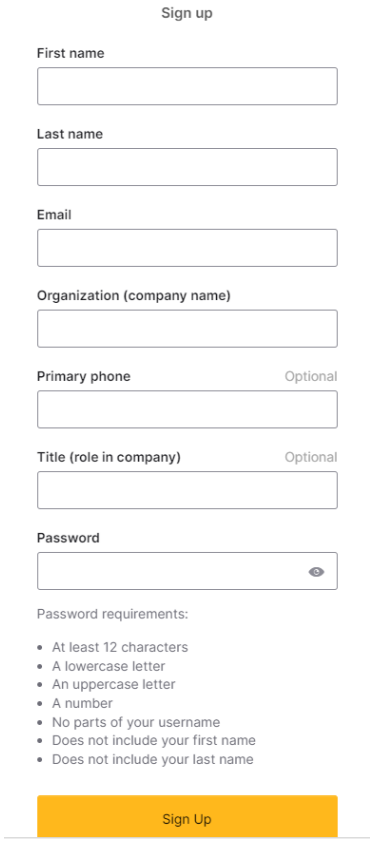



*Figure 3. Sign Up Page*

6. An automated email with the subject *Welcome to ServiceNow Customer Service Management* will be emailed to you. This email contains a verification code to finish setting up your account.

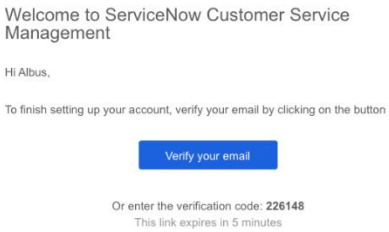



*Figure 4. Verification Email to Finish Setting Up Account*

7. Click the link in the email or on the portal click *Enter a verification code instead* and enter the code from the email, where it says Enter Code. Click *Verify.*

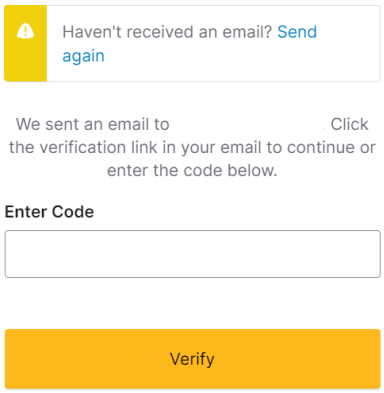



*Figure 5. Enter Verification Code*

8. You are now a registered user and will be automatically logged in and redirected to the Accounts Payable and Vendor Master Help Center homepage where you can submit inquiries and view status on your Cases.

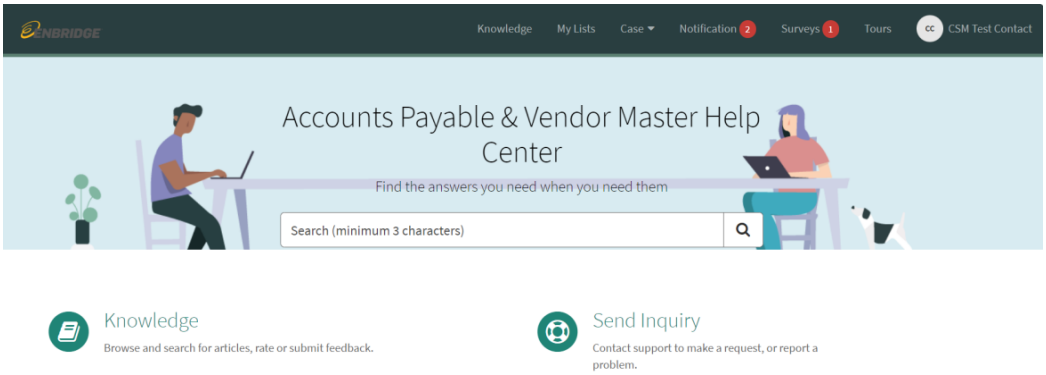



*Figure 6. AM & VM Help Center Homepage*

## 3 SIGN IN AS AN EXISTING SUPPLIER USER

9. If you are an existing registered user, provide your credentials and click *Sign In*.

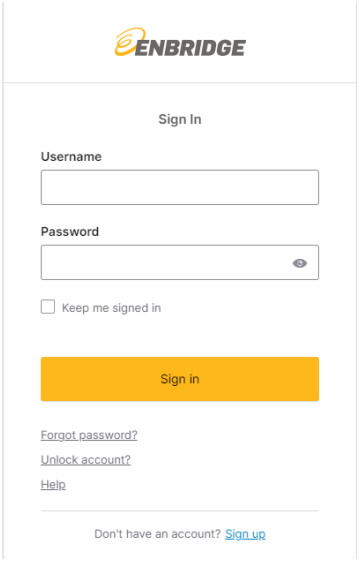



*Figure 7. External Supplier Sign In*

10. You will be prompted to send a verification email. Click *Send me an email*.

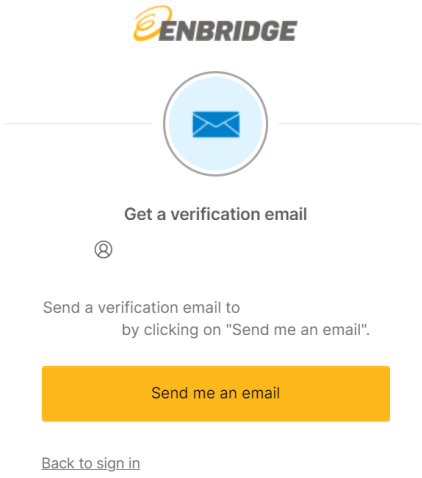



*Figure 8. Send Verification Email*

11. You will receive an email with the subject *One-time verification code*. The verification code expires after 5 minutes. Click the link in the email to sign in or click *Enter a verification code instead* in the portal.

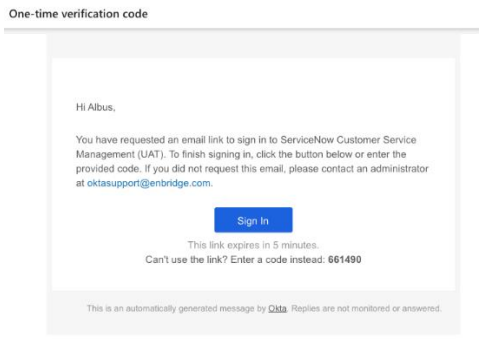



*Figure 9. One-time Verification Code*

12. Enter the code from this email into the portal, where it says Enter Code. Click *Verify.*

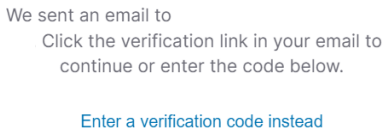



*Figure 10. Enter A Verification Code Instead*

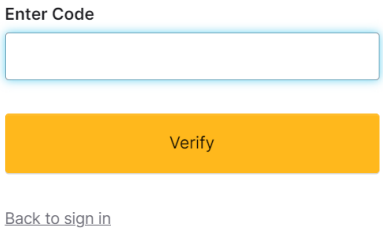



*Figure 11. Enter Code and Verify*

## 4 SUBMIT AN INQUIRY

13. Once you have logged in, you will be automatically redirected to the Accounts Payable and Vendor Master Help Center homepage. Click on *Send Inquiry* to navigate to catalog of available inquiry types.

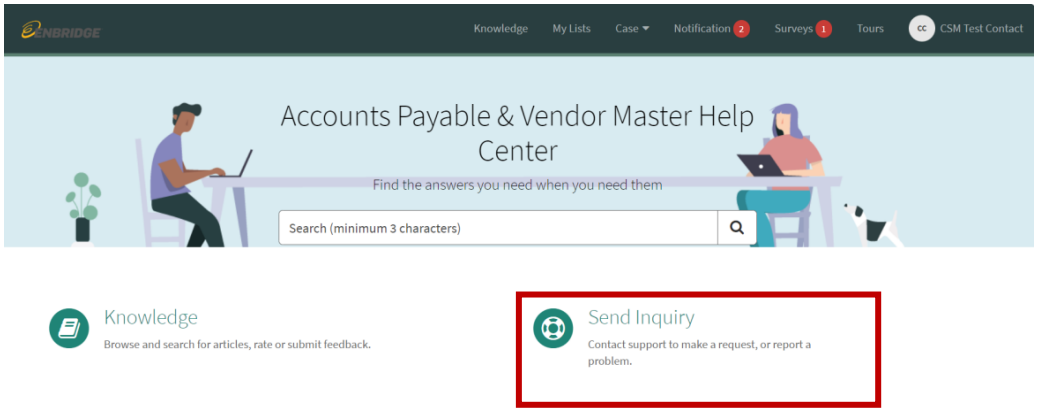



*Figure 12. Accounts Payable & Vendor Master Help Center Homepage*

14. Navigate through the categories Accounts Payable and Vendor Master on the left. Click on the underlined name of the form that matches your inquiry.

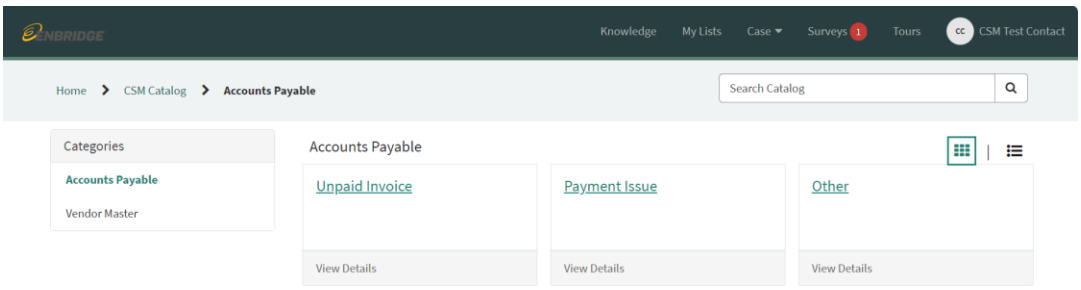



*Figure 13. Accounts Payable Catalog - Card View*

15. Begin filling in the fields. Fields with a red Asterix are mandatory before submission. Under the Submit button on the right, you will see highlighted any unanswered mandatory fields.

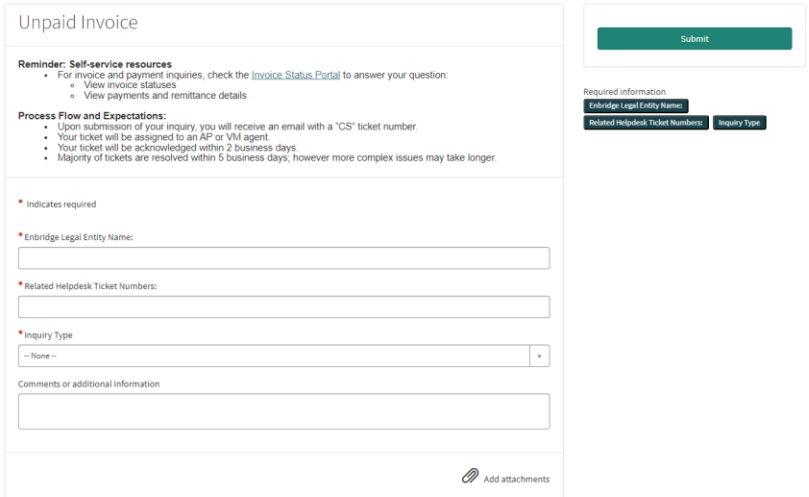



*Figure 14. Example Accounts Payable Inquiry Form Layout*

16. As you enter the mandatory fields, new fields may appear and must be entered.

    **Note:** Additional guidance, instructions, links, or information may appear in the form.

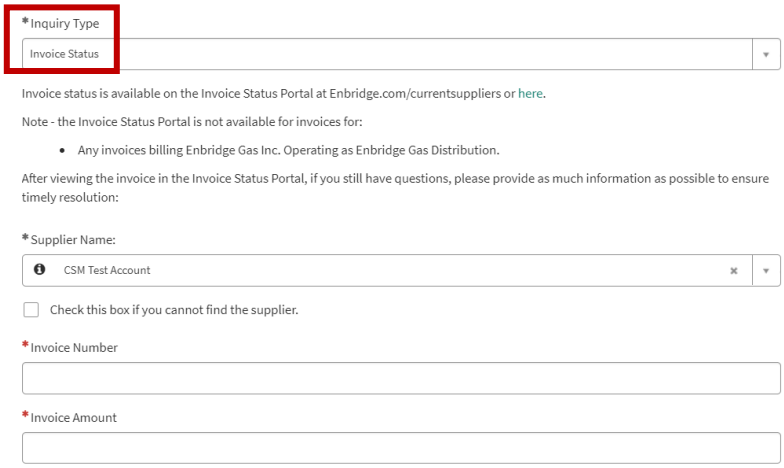



*Figure 14. Invoice Status Form and Additional Information*

17. If you are required to provide a supplier name, the supplier name field will show the supplier name linked to your profile.

    **Note:** If you have recently created your profile, you may not immediately see a supplier name appear in the dropdown, however it should appear for future inquiries.

18. If the supplier name is not available in the list, select the checkbox and manually type the supplier name related to your inquiry.


*Figure 15. Manually Input Supplier Name*

19. Use the free text box at the end of the form to add additional comments.
20. To add any attachments to your inquiry, click on the *Add attachments* button.
    **Note:** there is a limit of 1024 MB.


*Figure 16. Add Additional Comments and Attachments*

21. Once completed, click *Submit* to submit the inquiry. You will be immediately redirected to an overview of your Case details, which you can revisit later.

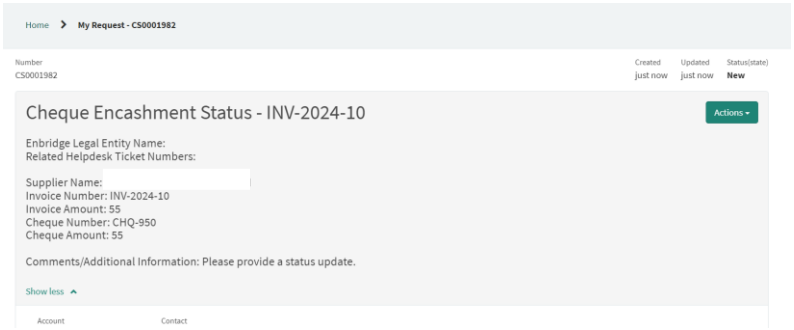



*Figure 17. Newly Submitted Case*

## 5 TRACK AND VIEW YOUR INQUIRIES

22. To see all your past inquiries, navigate to the top of your screen, select *Case* and then *All Cases*. It's possible to sort the list by clicking the column headers. Click the Case number to open the Case to view Case dialogue with the Enbridge Agent working on your Case.

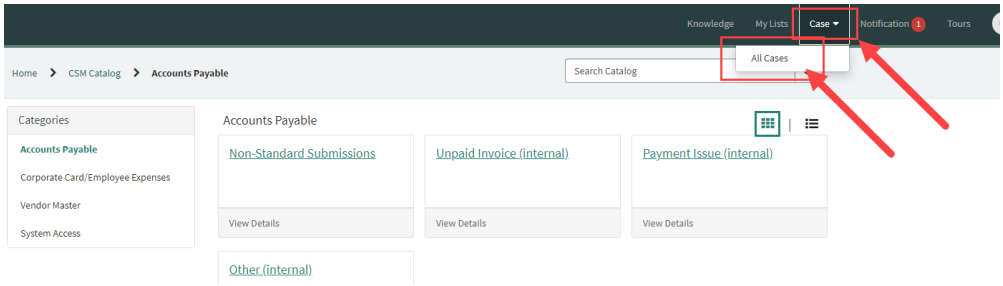



*Figure 18. All Cases Table*

23. You can also use the search feature to locate a Case using the Case number or invoice number.

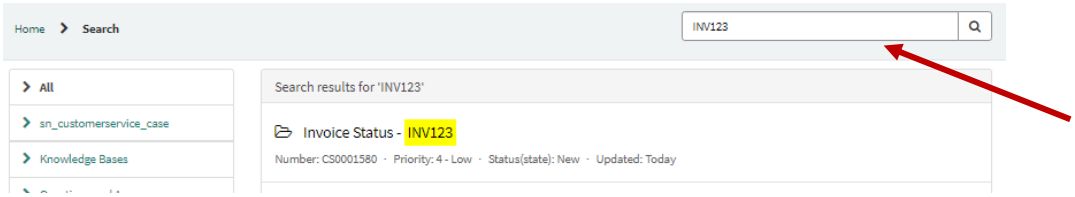



*Figure 19. Search for Case*

24. In the Case, you will see details including the Case number (begins with CSxxxxxx), short description, when the Case was created and latest updated, status of the Case and activity log. These Case details will always be available. Any comments or attachments made by you or added by an Agent, will appear in the activity log of the Case.

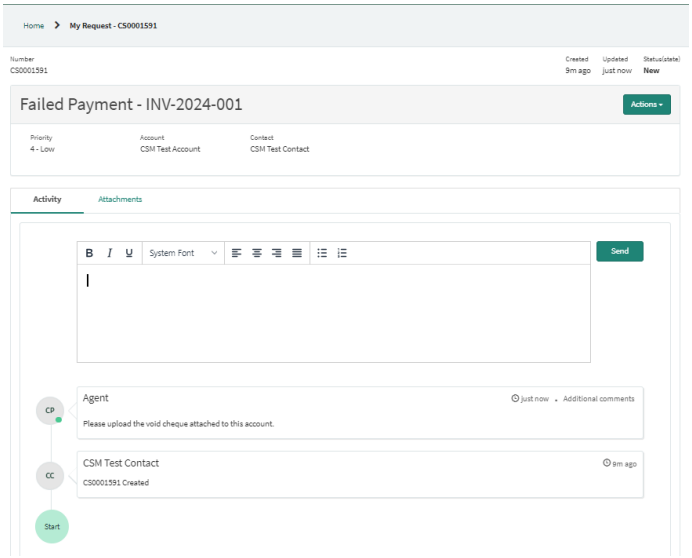



*Figure 20. Case Details*

25. If a Case requires additional information from you, you will see it appear in the notification tab at the top of your screen. The state noted on the Case will be *Awaiting Info*. Add the requested information in the comments and/or attachments. Once you have updated the Case, the state will change to *Open*.

    **Note:** you will also receive an email notification when information is being asked of you. You may also reply to that email notification and your reply will attach to your Case.

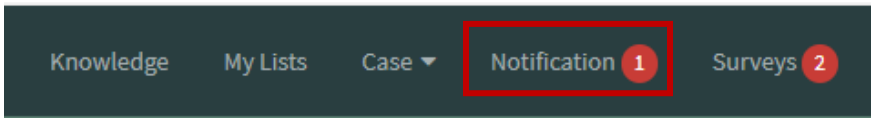



*Figure 21. New Notification in Portal*

## 6 ADD COMMENTS AND ATTACHMENTS

26. A text box to add additional comments or attachments is available for you to communicate with the Agent. Once you have written your message, click *Send*.

    **Note:** Additional comments can only be added if the Case is not yet closed.

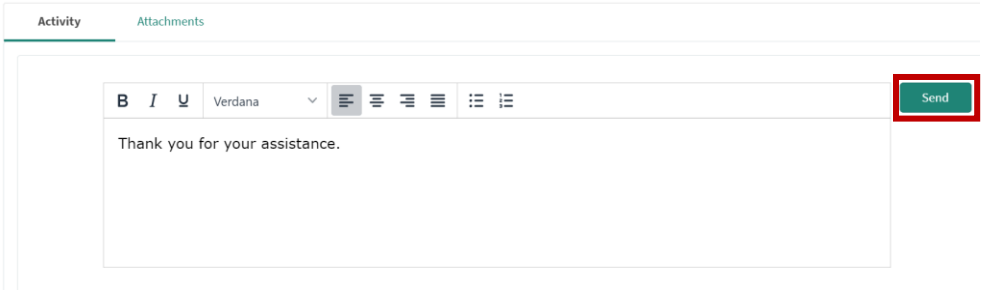



*Figure 22. Add Additional Comments*

27. Open the Attachments tab within the Case to add attachments. Existing attachments will appear below. Click the paperclip icon and choose the file from your file explorer or drag and drop in this field.

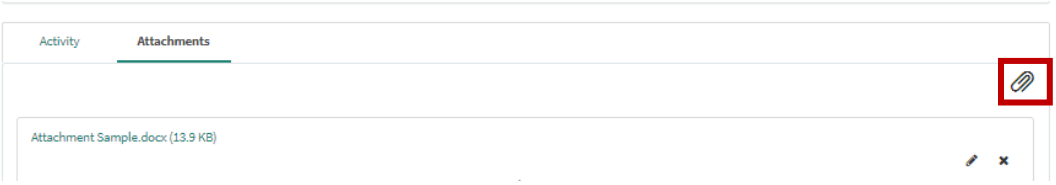



*Figure 23. Add Additional Attachments*

## 7 EMAIL NOTIFICATIONS

28. As your Case is being worked on, you will receive notifications when there are updates/communications regarding your open case. The following events will prompt an automated email to you regarding your case:

### Case Opened

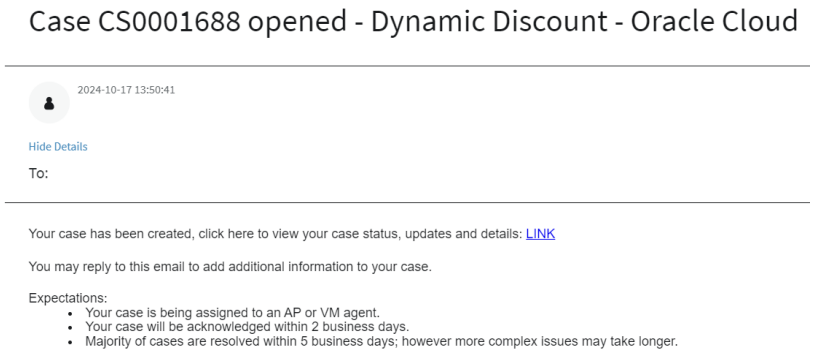



*Figure 24. Case Opened Email*

## Additional Comments Added


Case CS0001407 comments added

2024-10-17 00:46:02

Hide Details

To:

Short Description: Vendor Master - Other

There is a new comment regarding your open case.  Below displays the last 3 comments on this case, however you can view all comments in your case here:  LINK

You may reply to this email which will attach as a response in your case.

Comments:

**2024-10-17 05:45:49 - Agent**

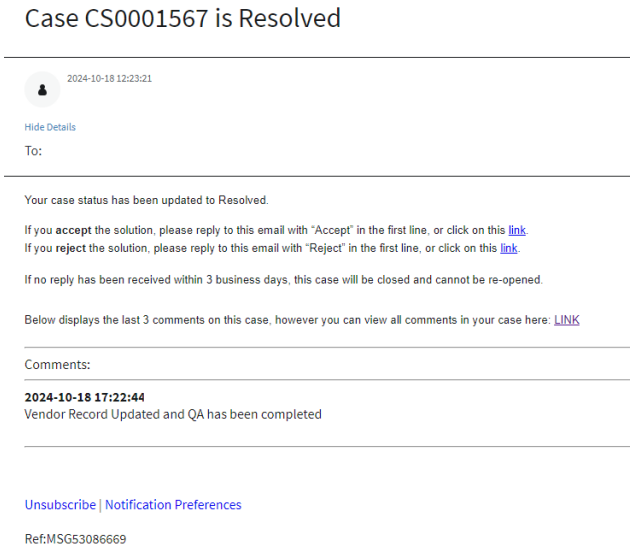
No action required

Unsubscribe | Notification Preferences

Ref:MSG53083931

*Figure 25. Additional Comments Added Email*

## Case Resolved and Solution Proposed


Case CS0001567 is Resolved

2024-10-18 12:23:21

Hide Details

To:

Your case status has been updated to Resolved.

If you **accept** the solution, please reply to this email with "Accept" in the first line, or click on this link.
If you **reject** the solution, please reply to this email with "Reject" in the first line, or click on this link.

If no reply has been received within 3 business days, this case will be closed and cannot be re-opened.

Below displays the last 3 comments on this case, however you can view all comments in your case here: LINK

Comments:

**2024-10-18 17:22:44**
Vendor Record Updated and QA has been completed

Unsubscribe | Notification Preferences

Ref:MSG53086669

*Figure 26. Case is Resolved Email*

### Case Closed

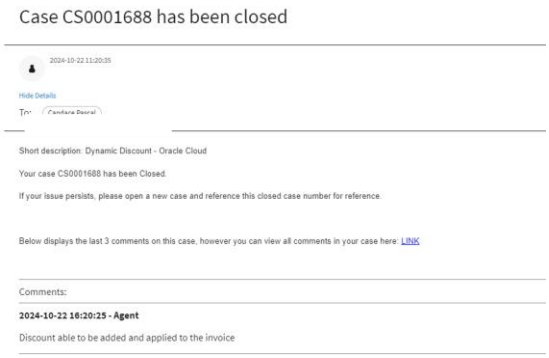



*Figure 27. Case is Closed Email*

### Customer Service Satisfaction Survey Following Case Closure

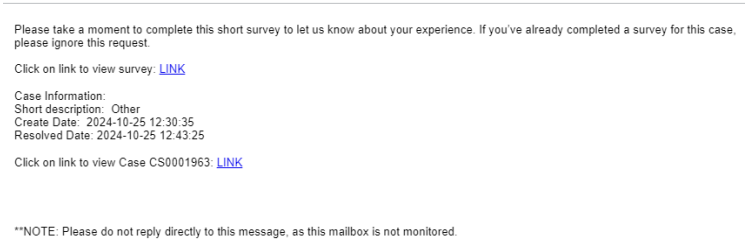



*Figure 28. Customer Service Satisfaction Survey Feedback Email*

29. When you receive an email notification, if you reply to that email then your reply will attach itself to your open Case and be received by the AP/VM agent. When replying via email, ensure that the reference number that is included in the body of the email notification (shown below) is not removed so that your email is can be linked to your Case.

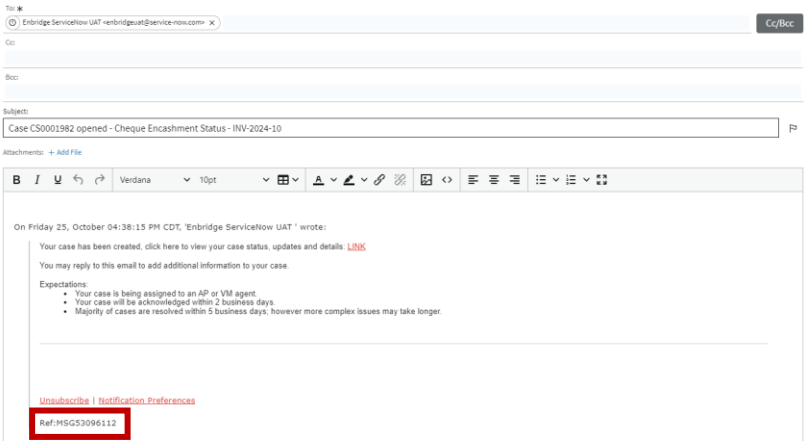



*Figure 29. Reply to Email*

## 8 ACCEPT A PROPOSED SOLUTION

**30.** Once an AP/VM Agent has proposed a solution to you for your Case, you will receive an email notification to accept or reject the solution. The email notification will provide you with the opportunity to accept or reject the proposed solution. Along with the email notification, you will also see a pending notification in your ServiceNow portal page where you will see the resolution commentary in the comments section.

**Important:** If you don't respond to the proposed solution within 3 business days (via email or via ServiceNow) the Case will be closed and cannot be reopened. If you respond with 'reject' or you send another comment to your Case, the Case will remain open.

**Note:** Once a solution is accepted, the Case will automatically close and the CSAT survey will launch. If it is rejected, the Case will remain open.

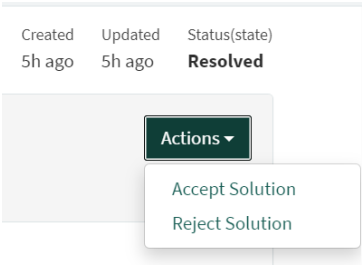
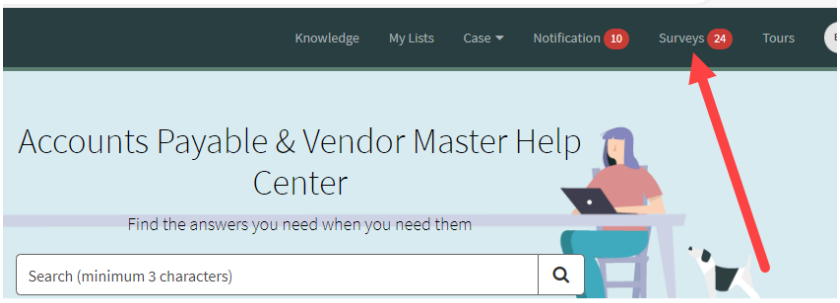



*Figure 30. Accept or Reject Solution*

## 9 COMPLETE CSAT SURVEY

31. Once your Case is resolved and closed, you will receive an email notification requesting to complete a short CSAT survey and in the ServiceNow platform view you will see a survey pending to complete for your completed Case. Click to open your survey.




32. Click Get Started and provide your feedback.

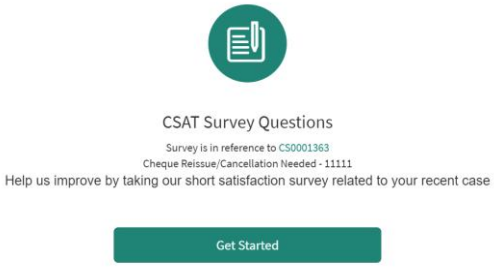



*Figure 31. CSAT Survey*

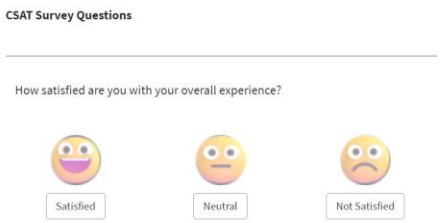



*Figure 32. Example CSAT Survey Question*

33. Once you have finished, clicked *Submit*.

## 10 CLOSE A CASE

34. As the submitter, you can close the Case before resolution for any reason by clicking *Actions* and then *Close Case*.

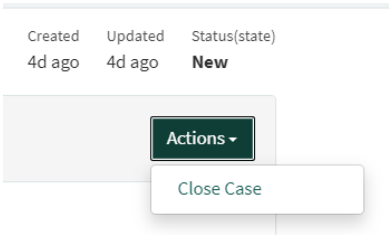



*Figure 33. Close a Case Before Resolution*

## 11 NAVIGATE KNOWLEDGE BASE

35. The knowledge base is where you can search for articles that contain useful information. From the homepage, to navigate to the knowledge base, click on Knowledge.

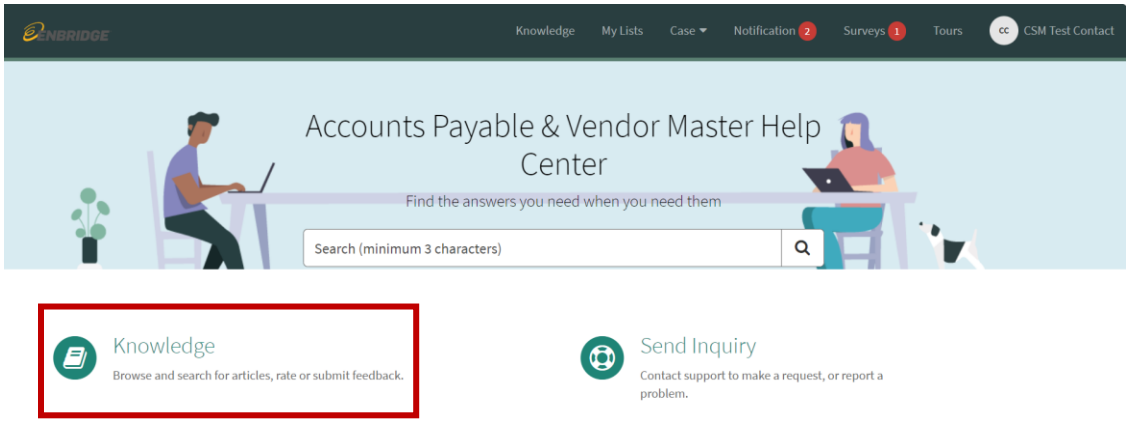



*Figure 34. Accounts Payable & Vendor Master Help Center Homepage*

36. Select an article that interests you and provide feedback on whether the article was helpful once you are done reading.

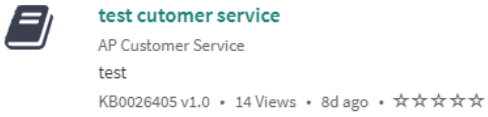



*Figure 35. AP Customer Service Knowledge Article*

## 12 LOGOUT AND CHANGE PASSWORD

37. To log-out of the portal, click on the user profile on the top-right and click *Log Out*.

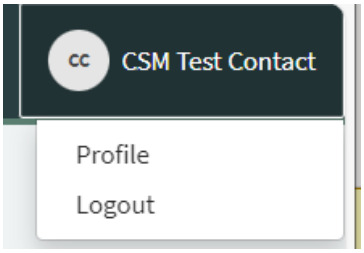



*Figure 36. Logout of CSM Portal*

38. If you want to change your password, make sure you are logged out and return to the sign in page. Select *Forgot password* and enter your email address.
39. Check your email for a verification code. Enter the verification code or click the link in the email. Proceed with resetting your password following the requirements listed. Once complete, click *Reset Password*.

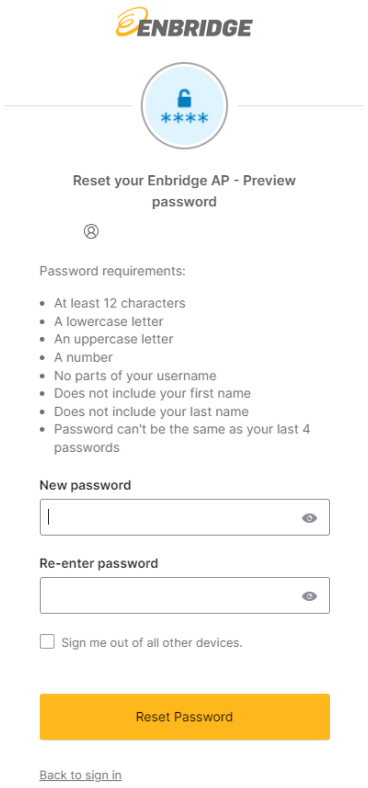



*Figure 37. Reset Password*

40. If you are encountering further issues with signing in, visit the Help page https://enbridgeap.oktapreview.com/help/login for further instructions.