

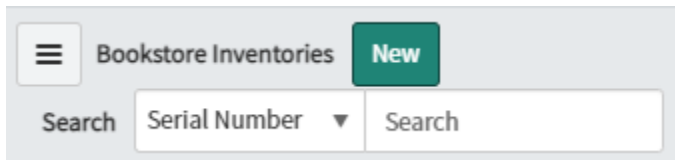
SERVICENOW Entry Guide



Bookstore Inventories

When entering new customer records into ServiceNow, you must enter the device purchased into the NCSU **Bookstore Inventories**.

Adding An Inventory Item

1. From the ServiceNow homepage, select **Bookstore Inventories**, located on the left side menu.
2. To prevent duplicate records, search for an existing customer record using device serial number:
 - a. At the top of the page, select **Serial Number** from the drop-down menu under the **Bookstore Inventories Context Menu**.
 - b. Enter the customer device serial number into the search box to the right of the drop-down menu.

A screenshot of the ServiceNow interface for 'Bookstore Inventories'. It shows a search bar with a dropdown menu currently set to 'Serial Number'. To the right of the dropdown is a 'Search' button. Above the search bar is a 'New' button. To the left of the search bar is a 'Search' label.

3. If the search yields no existing record, select the **New** button to create a new inventory record.
4. After selecting the **New** button, a **New Record** page will appear. Fill in all of the following text fields:
 - a. **Serial Number**- Customer device serial number.
 - b. **Computer Model**- Type customer device model number or search for the device using the  icon.
 - c. **Inventory Status**- From the drop-down menu, select **Available**
 - d. **Price** -Enter the original price or sale price of the customer device
 Important: If the customer device has a sale price, enter the original price and applicable discount code in the **Notes** section.
 - e. **Notes**- Enter any relevant notes about the customer device. See **d.** Above.
5. Select **Submit** to complete and save the new inventory entry.

Finding an Existing Serial Number In Bookstore Inventories

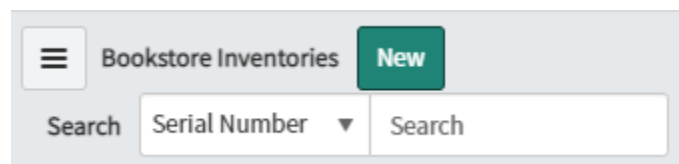
Searching for an existing customer device serial number is a step in the process of **Adding a New Inventory Item**, however, the need often arises to perform a search for a customer device serial number as part of a separate task. To search for an existing serial number in ServiceNow:

1. Begin with [step 2 of Adding an Inventory Item](#).
2. If the search yields a matching result, the result will be the first item in the returned list. Otherwise, the closest result to the entered serial number will appear as the first item in the list.

Adding a Bookstore Model

As a part of the ServiceNow record entry process, it is sometimes required to add new device models into the ServiceNow database. To add a new bookstore model:

1. From the ServiceNow homepage, select **Bookstore Models**, located on the left side menu.
2. To prevent duplicate records, search for an existing model record using device model number or manufacturer name:
 - a. At the top of the page, select **Computer type/Model number** or **Display Name** from the drop-down menu under the **Bookstore Models Context Menu**.
 - b. Enter the device model number or manufacturer name into the search box.




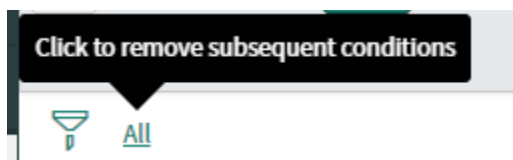
3. If the search yields no existing record, select the **New** button to create a new **Bookstore Model** record.
4. After selecting the **New** button, a **New Record** page will appear. Fill in all of the following text fields:
 - a. **Computer Model:**
Apple Devices: Year/Model Name
For all other manufacturers: Model Name
 - b. **Computer Type/ Model Number- :**
Apple Devices: Model Number/ Screen Size/Hard Drive Capacity/Color/RAM/CPU
For all other manufacturers: Manufacturer Name(Dell, etc.)/ Model Name

▲ Note: To enter a custom order or open box computer, simply enter Open Box or Custom in the **Computer Model** text box.

- c. **Manufacturer**
 - d. **SKU**
 - e. **Base Price**
 - f. **Base Warranty**-The drop down menu is pre-populated with all relevant base warranty options.
 - g. **Created**
5. Check the active box
- Active
- ☒
6. Complete the required text fields in **Specs**.
7. Finally, select the **Update** button to complete the record.

Finding an Existing Bookstore Model

1. From the ServiceNow homepage, select **Bookstore Models**, located on the left side menu.
2. At the top of the page and directly to the right of the  icon, select the **All** search filter to reset any existing search filters.



3. Search for the existing model by using the **Search** drop down menu.
- ▲ Note: Using the SKU will yield the most accurate search results.

Customer Records in ServiceNow

Entering a New Record in ServiceNow

Prerequisites:

- ServiceNow login
- Customer folder
- Current PackTech Computer Orders and Serial Numbers Google Spreadsheet

Current PackTech **Computer Orders** and **Serial Numbers** Google spreadsheet This section will cover the steps required to complete a new ServiceNow customer record successfully. To create a new Customer Record:

1. Open the correct PackTech Computer Orders Spreadsheet and search for the customer device serial number.
2. Once the correct serial number is located, search the correct PackTech Serial Numbers Spreadsheet to confirm the serial number and model.
3. From the Service Now homepage, select **Bookstore Inventories** from the left side menu.
4. Create a new **Bookstore Inventory** record. See [Adding An Inventory Item](#) for reference.
5. Once the new **Bookstore Inventory** record is complete, select **Bookstore Customer Purchases** from the left side menu on the Service Now homepage.
6. Select the **New** button.
7. A new Bookstore Customer Purchases record will open.
8. Fill out all of the following fields:
 - a. **Order Number-**
 - i. If the order is written, locate the slip print information on the order form.
 - ii. Enter the order number using the format: four-digit register number, four-digit year, two-digit day, four-digit transaction number. When entered correctly, the order number will match the following format:
RRRRYYYYDDTTT.
 - b. **Customer Name-** Enter the customer name
 - ▲ Note: Using the student ID # is the most accurate search parameter
 - c. **Email-** Only enter an Alternate Email if the customer did not provide an NCSU email
 - d. **Phone Number**
 - e. **Order Status-** Select **Complete** from the drop-down menu

3. Once found, select **Order Number** to go to the **Customer Purchase Page**.
4. Under the **Order Status** drop down menu :
 - a. Select **Cancelled by Customer** if the customer wants to cancel the order.
 - b. Select **Cancelled by Bookstore** if the purchase has been deemed fraudulent or if customer is unresponsive after multiple contact attempts.
5. Check the Pending Action box.
6. In the **Bookstore Notes** section, specify why the record is being cancelled.
7. **Update** the Customer Purchase Page.
8. From the ServiceNow homepage, select **Bookstore Inventories**
9. Search for the customer device serial number.
10. Under the **Inventory Status** drop down menu, change record from **Assigned to Customer** to **Available**.
11. Select **Submit**.

Searching for an Existing Customer in Service Now

1. From the ServiceNow homepage, select **Bookstore Customer Purchases** from the left side menu.
2. Select customer name from the drop down menu and enter the customer name in the search box. Alternatively, search using the customer order number.