



# Australia Customer Relationship Management

Last updated: 06/12/2026

Some examples and graphics depicted herein are provided for illustration only. No real association or connection to ServiceNow products or services is intended or should be inferred.

ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company and product names may be trademarks of the respective companies with which they are associated.

Please read the ServiceNow Website Terms of Use at [www.servicenow.com/terms-of-use.html](http://www.servicenow.com/terms-of-use.html)




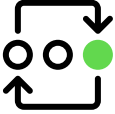

Company Headquarters  
2225 Lawson Lane  
Santa Clara, CA 95054  
United States  
(408) 501-8550

# Table of Contents

<b>Customer Relationship Management.....</b>	<b>4</b>
About CRM.....	4
Customer Service Management.....	6
Field Service Management.....	7
Sales CRM.....	8
Industry Solutions.....	8
Data management.....	9
Data models.....	13
Customer data.....	19
User management.....	23
Product data.....	27
Product catalog.....	29
Service Model Foundation.....	30
Partner Relationship Management.....	32
Workspace experience.....	34
Configurable workspace.....	35
Playbooks.....	37
Customer Central.....	41
Recommended Actions.....	43
Self service.....	46
Self-service portals.....	47
Omnichannel.....	49
Web embeddables.....	53
CRM products.....	57

# Customer Relationship Management

Use the ServiceNow® Customer Relationship Management (CRM) products to manage customer interactions, service requests, field operations, and order fulfillment across the full customer lifecycle.

<p><b>About CRM</b></p>  <p>Learn how CRM can help you with its key features and benefits.</p>	<p><b>Data Management</b></p>  <p>Understand how the CRM portfolio is built on a shared data foundation.</p>	<p><b>Workspace Experience</b></p>  <p>Create a unified, configurable environment for agents to do their work.</p>
<p><b>Self Service</b></p>  <p>Give customers the tools they need to help themselves.</p>	<p><b>CRM Products</b></p>  <p>Understand the different products that make up the CRM portfolio.</p>	

## Additional resources

- Log in to your ServiceNow® account and find additional information about implementing and deploying CRM features at [Now Create](#).
- Access real-time courses, self-paced training, and career resources at [ServiceNow University](#).
- Find useful resources related to your role and explore best practices at the [Customer Success Center](#).
- Connect with other Customer Service Management users at [Now Community](#).

## About CRM

Use the Customer Relationship Management (CRM) applications on the ServiceNow platform to manage customer interactions, service requests, field operations, and order fulfillment across the full customer lifecycle. Whether you are starting or expanding a CRM implementation, learn more about the available products, features, and workflows that can help your organization deliver consistent, connected customer experiences.

## Overview of CRM

The ServiceNow CRM applications bring together the people, processes, and data involved in serving customers, giving every team a shared view of the customer and the workflows needed to act on it. Because all CRM applications share a common data model on the ServiceNow

AI Platform, customer context flows across teams and systems without duplication or manual synchronization.

- **Case and work order management** to track customer issues, service requests, and field tasks from creation to resolution.
- **Workflow automation** to assign work, trigger notifications, and coordinate tasks across front, middle, and back-office teams.
- **Self-service tools** including portals, virtual agents, and knowledge bases that enable customers to resolve issues independently.
- **AI-assisted agent tools** such as recommended actions, case summarization, and predictive routing that help agents work more efficiently. Agents direct and remain accountable for the use of AI features.
- **Configurable workspaces and playbooks** that surface the right information and guide agents through consistent processes.

## Benefits

- Connect front, middle, and back-office teams so that customer issues can be tracked and resolved across departments without manual handoffs.
- Provide agents and field technicians with a complete view of the customer, including account history, active cases, entitlements, and installed products.
- Reduce contact volume and resolution time through self-service tools and automated workflows.
- Manage the full product sales lifecycle, from lead and opportunity through order fulfillment, contract management, and renewal, on a single platform.
- Extend core CRM capabilities with industry-specific workflows and data models tailored to telecommunications, financial services, healthcare, government, and technology providers.

## CRM products and solutions

### Customer Service Management

The Customer Service Management application enables organizations to manage customer cases, automate service workflows, and give agents visibility into the customer systems and tools they need to deliver proactive support. Customer Service Management connects front, middle, and back-office teams so that issues can be tracked, escalated, and resolved efficiently.

### Field Service Management

The Field Service Management application enables organizations to manage work requests that require on-site service from field technicians. Field Service Management connects dispatchers, managers, and technicians through automated scheduling, mobile task access, and real-time visibility into work order status.

### Sales CRM

The Sales CRM applications, formerly Sales and Order Management (SOM), enable organizations to manage the product sales lifecycle, from pre-sales leads and opportunities through quote generation, order capture, order fulfillment, and post-sales contract management.

### Industry Solutions

Industry solutions extend the core CRM products with prebuilt workflows, data models, and case types tailored to specific verticals. Available industry solutions include Financial Services Operations, Healthcare and Life Sciences,

Manufacturing Commercial Operations, Public Sector Digital Services, Retail, and Telecommunications, Media, and Technology.

## Customer Service Management

Customer Service Management (CSM) is the foundation of the CRM solution. It defines how customers are managed, how service requests are tracked, and how the shared data model that connects the rest of the CRM portfolio is built and maintained.

### Role of CSM in CRM

Every interaction in a CRM solution starts with a customer: an account, contact, or consumer; a product they own; and a history of how the organization has served them. CSM is where that customer information lives. It provides the data model for customers, assets, entitlements, and cases that the rest of the CRM products utilize. For example, when a sales team closes a deal in Sales CRM and updates a customer record, those updates are reflected in CSM. When a field technician arrives at a customer site, the account and asset information they see in FSM is similarly referenced in CSM.

Because CSM operates on the ServiceNow AI Platform alongside the other CRM products, the customer data it maintains does not need to be duplicated or synchronized manually. A service agent, a sales representative, and a field technician can each work from the same customer record, seeing the full context of the relationship at any point in the customer lifecycle.

### CSM across the CRM portfolio

#### CSM and CRM products and solutions

Product or solution	Extends CSM to cover	What it adds
Field Service Management	On-site service delivery	Work orders created from CSM cases dispatch technicians with full customer and asset context, and feed completion status back to the originating case.
Sales CRM	The commercial customer lifecycle	Extends the customer relationship to cover selling, quoting, order fulfillment, and contract management.
Financial Services Operations	Banking and insurance operations	Extends CSM case management with financial services workflows and case types specific to banking and insurance.
Telecommunications Service Management	Telecom customer and network service	Extends CSM with telecom-specific case types and workflows for managing customer accounts and network issues.
Public Sector Digital Services	Government service delivery	Extends CSM for government agencies, adding constituent-facing portals and cross-agency workflow coordination.
Healthcare and Life Sciences	Patient and care provider service	Extends CSM with healthcare-specific workflows for managing patient requests and care coordination.

**CSM and CRM products and solutions (continued)**

Product or solution	Extends CSM to cover	What it adds
Manufacturing Commercial Operations	Manufacturing sales and service	Extends CSM and Sales CRM with workflows for managing dealer relationships, warranty claims, and product lifecycle operations.
Retail	Retail operations and service management	Extends CSM with a suite of applications to help customers optimize their retail processes.

**Field Service Management**

Field Service Management (FSM) is the part of the CRM solution that extends service delivery into the field, ensuring that when a customer problem requires physical intervention, it flows seamlessly from the service record rather than becoming a disconnected activity.

**Role of FSM in CRM**

FSM closes the loop between a customer case and an on-site resolution. When a service agent in CSM determines that field work is needed, a work order can be created directly from the case and dispatched to a technician, carrying the customer's account, asset, and service history with it. The technician arrives informed, completes the work using the guidance of playbooks, and the case is updated automatically when the work order is closed.

FSM also supports order fulfillment within CRM. When a Sales CRM order requires on-site installation or configuration, FSM receives the work order from the fulfillment workflow and dispatches the appropriate technician.

**FSM across the CRM portfolio**

**FSM connections to CRM products and solutions**

Connection	FSM role	CSM / Sales CRM role
Case-driven work orders	Receives work orders created from CSM cases and assigns them to field technicians. Work order completion updates the originating case automatically.	Agents create work orders directly from a case record when on-site service is required. The case and work order remain linked throughout.
Shared customer data	Account, contact, and asset information from CSM is available on work orders, giving technicians customer context before arriving on site.	CSM maintains the shared customer data model. Records are available in FSM without duplication or manual transfer.
Order fulfillment	Receives work orders from Sales CRM fulfillment workflows when an order requires on-site installation or configuration.	Sales CRM triggers work order creation in FSM for applicable order types. Fulfillment status in Sales CRM reflects the outcome of the field work.

## Sales CRM

Sales CRM is the part of the CRM solution that manages the commercial side of the customer relationship, from initial opportunity through to a fulfilled order and ongoing contract.

### Role of Sales CRM in CRM

Sales CRM closes the gap between sales, fulfillment, and service by bringing them onto the same platform. A service agent handling a billing dispute can see the original order and its history. A fulfillment team responding to a change request can act without waiting for information to be passed manually. When a customer's contract approaches renewal, the sales team is notified automatically.

Sales CRM manages the lead-to-cash lifecycle through applications covering lead and opportunity management, CPQ, order capture, order fulfillment and operations, and post-sales contract management.

### Sales CRM across the CRM portfolio

#### Sales CRM connections to CRM products and solutions

Connection	Sales CRM role	CSM / FSM role
Order case management	Creates order cases when issues arise with an order, such as quantity changes, delivery updates, or billing discrepancies.	CSM provides the case management framework that Sales CRM extends for order-related issues. Service agents handle order cases in CSM Configurable Workspace.
Shared customer data	Order, contract, and entitlement data created in Sales CRM is available to service agents without manual synchronization.	CSM maintains the shared customer data model. Agents can see what the customer has ordered and what they are entitled to.
Field service fulfillment	Triggers work order creation in FSM for order types that require on-site installation or configuration.	FSM receives work orders from Sales CRM fulfillment workflows and dispatches technicians to complete the required on-site tasks.

## Industry Solutions

The CRM portfolio includes industry solutions that extend the core CRM products for specific verticals. Each solution builds on the CSM foundation, inheriting its customer data model, case management framework, and shared platform, and adds the workflows, data structures, and case types that organizations in that industry need.

### Overview of industry solutions

Rather than requiring organizations to build industry-specific processes from scratch, industry solutions provide a starting point that reflects common patterns and requirements within each vertical. They can be further configured to meet an organization's specific needs.

#### Industry solution overview

Industry solution	Vertical	What it addresses
Financial Services Operations	Banking and insurance	Extends CRM with workflows and data structures for managing banking and insurance operations, including

**Industry solution overview (continued)**

Industry solution	Vertical	What it addresses
		front, middle, and back-office coordination for financial service requests, disputes, and case management.
Healthcare and Life Sciences Service Management	Healthcare and life sciences	Extends CRM for healthcare organizations and life sciences companies, supporting patient and care provider service requests, care coordination workflows, and operational case management.
Manufacturing Commercial Operations	Manufacturing	Extends CRM and Sales CRM for manufacturers managing dealer relationships, warranty and recall claims, pre-authorization requests, and the lead-to-cash lifecycle across complex product and channel ecosystems.
Public Sector Digital Services	Government	Extends CRM for government agencies delivering constituent and business services, with prebuilt government case types, cross-agency workflow coordination, and constituent-facing self-service capabilities.
Retail	Retail	Extends CSM and FSM for retail organizations, enabling store-based case management, issue reporting by front-line staff, task assignment from headquarters to store locations, and visibility into store performance.
Telecommunications, Media and Technology	Telecom, media, and technology providers	A suite of applications that extends CRM across customer care, order management, network operations, and partner ecosystems for telecommunications, media, and technology service providers.

**Data management**

The ServiceNow CRM portfolio is built on a shared data foundation. The data models, customer records, product information, user roles, and service structures that underpin CRM are defined once and used across multiple products, including Customer Service Management (CSM), Field Service Management (FSM), Sales CRM, and industry solutions.

**Customer service value chain**

This shared data foundation ensures that every team works from the same information without duplication or manual synchronization.

### Customer service value chain



The CRM data management layer models the complete customer service value chain:

- The company that offers products and services.
- The service organizations (branches, stores, offices, hospitals) that deliver those services.
- The employees and staff who work at those organizations.
- The products and services themselves.
- The customers who consume them.

Every data domain in the CRM portfolio maps to one of these entities.

#### CRM entities

Entity	What it represents
Company	The organization building and offering products and services to end customers. This is the provider side of the service relationship: an enterprise, government agency, or other entity.
Service organizations	Internal or external entities of the company that serve customers directly. Includes branches, stores, franchises, offices, hospitals, and other service locations.
Employees and staff	People working at the internal and external service organizations: agents, technicians, fulfillers, managers, and specialists who deliver service.
Products and services	Physical and digital products and services that the company offers. Includes product models, sold products, install base items, contracts, and entitlements.
Customers	Individuals and organizations external to the company who consume products and services. Includes accounts, contacts, consumers, and households across B2B, B2C, and B2B2C models.

#### Customer service business models

The CRM data foundation supports several business models that determine how customer data is organized and how service is delivered. The business model defines which customer entities

are used: accounts and contacts for B2B, consumers and households for B2C, or a combination of all entities for B2B2C. The business model also defines how access, relationships, and case routing are configured.

Beyond the core business models, the Service Model Foundation (SMF) framework and the contributor user model extend the data foundation to support complex organizational structures and cross-functional service delivery. SMF introduces service organizations, business locations, and location-based roles that provide the flexibility to model multi-tier service structures across industries. The contributor user model enables internal employees outside the front-line service team, such as back-office specialists and middle-office workers, to participate in case resolution through scoped access and task assignment.

**Customer service business models**



Together, these models and frameworks give organizations the ability to configure a CRM environment that matches how they sell, service, and support their customers.

**CRM business models**

Business model	Description
B2B	In the business-to-business (B2B) model, the company provides products and services to other businesses. Customer data is organized around accounts (organizations) and contacts (employees of those accounts). The B2B model also supports customer relationships and account teams.
B2C	In the business-to-consumer (B2C) model, the company provides products and services directly to individual consumers. Customer data is organized around consumers and households.
B2B2C	In the business-to-business-to-consumer (B2B2C) model, the company supports business customers who, in turn, serve end consumers. Customer data spans accounts, contacts, and account consumers supporting multi-level relationships where a business customer's individual customers also need access to service.
B2B2E	In the business-to-business-to-employee (B2B2E) model, the company delivers products or services to another business, which then extends these offerings to its employees. The intermediary organization may be involved in procurement, customization, implementation, support, and training for its corporate employees.
SMF	The SMF framework expands the B2B and B2C models by introducing service organizations, internal and external

### CRM business models (continued)

Business model	Description
	business locations, households, and the relationships between these entities. SMF provides the core framework, security, and role-based access needed to model complex service structures across industry verticals.
Contributor users	The contributor user model provides unified customer support for internal and external customers. With this model, organizations can engage middle-office teams to resolve customer issues and requests, enabling employees to request support for themselves and for external customers, enabling service organizations to serve one another, and enabling middle-office agents to work on specific tasks required to resolve a case.

### Customer data foundation

The customer data foundation provides the capabilities for modeling, managing, and maintaining customer data across the CRM portfolio. It covers four areas: the core data model for customers and their relationships, access management that controls who can see and act on customer data, unified identity for users who hold multiple roles, and data privacy and quality tools.

#### Customer data foundation

Capability	What it provides
Data models	Models external customers and their relationships. Supports B2B (accounts and contacts), B2C (consumers and households), and B2B2C (account consumers) structures, along with customer profiles, addresses, relationships, and roles.
Customer access management	Provides configurable, granular access to CRM data through relationships and related parties, including: <ul style="list-style-type: none"> <li>• <b>Responsibilities:</b> Named access levels (such as Authorized Representative or Account Manager) that determine what a related party can see and do.</li> <li>• <b>Related Party Framework:</b> Links contacts, consumers or accounts to records (such as cases, sold products, or install base items) as related parties with assigned responsibilities so multiple users can collaborate on the same record with different access levels.</li> <li>• <b>Declarative Responsibility Framework:</b> A low-code/no-code framework for defining responsibility access configurations, reducing the need to write custom ACL scripts.</li> </ul>
Unified customer identity	Models a CRM user with multiple functions or personas, both internal and external. Supports scenarios such as an employee who is also a consumer, or a contact who is also a consumer, through a unified user record.

**Customer data foundation (continued)**

Capability	What it provides
Customer data privacy and quality	Manages data privacy compliance and maintains clean, accurate customer data including data classification.

**In this section**

**Data models**

Understand the layered data architecture underpinning the CRM portfolio, including how the Now Platform, CRM Foundation, Customer Workflows (Sales CRM, CSM, FSM), and Industry Workflows relate to each other.

**Customer data**

Configure and manage accounts, contacts, consumers, and households, the core customer records that agents, sales teams, and technicians rely on across the CRM portfolio.

**User management**

Define and organize internal and external users, assign roles and group memberships, and control access to CRM features and case data

**Product data**

Understand how product models, sold products, install base items, and installed products give agents and customers a shared view of what has been purchased and how it is deployed.

**Product catalog**

Understand how products and services are defined in the catalog and how catalog items connect to product models to enable self-service requests and order management.

**Service Model Foundation**

Understand the framework that models service organizations, internal and external business locations, and the relationships between them.

**Partner relationship management**

Understand how channel partners are onboarded, managed, and enabled to sell and support customers through partner programs, deal registration, and the partner workspace.

**Data models**

The CRM portfolio is built on a layered data architecture where each tier inherits from the one below it. This topic explains the four layers, Now Platform, CRM Foundation, Customer Workflows, and Industry Workflows, and the objects that connect them. Understanding this architecture is essential for configuring, extending, and troubleshooting CRM implementations.

**CRM architecture**

The CRM portfolio is organized into four tiers.

CRM product architecture



At the base, the Now Platform provides the core tables, AI capabilities, and engines that every ServiceNow product inherits. Above that, the CRM Foundation defines the shared data objects (Customer, Organization, Territory, Product, and Pricing) along with shared engines and the transactional objects (Opportunity, Quote, Order, Install Base, Contract, Case, Work Order) that all CRM products use. The Customer Workflows tier delivers the three core CRM products at the same level: Sales CRM, Customer Service Management (CSM), and Field Service Management (FSM). At the top, Industry Workflows provide preconfigured solutions for verticals including Telecom, Technology, Financial Services, Public Sector, Healthcare, Retail, and Manufacturing.

Sales CRM, CSM, and FSM are not separate systems sharing data through integrations. They are three products built on the same CRM Foundation and platform data model. A company record, a person record, a product, a contract, each exists once in the CRM Foundation and is used by all three products and every industry solution above them.

**Layer 1: Now Platform base**

Every ServiceNow product is built on the same core tables. These base objects are not replicated per product; they are inherited. When a Case is created in CSM, it extends the same Task record that an ITSM Incident extends. When an Order is created in Sales CRM or a Work Order in FSM, both extend the same Task record. The same holds for person records, company records, and SLA logic. This layer also includes Predictive AI and GenAI capabilities.

**Now Platform base**

Platform object	Table name	What it does
Task	sn_task	Master table for all transactional records. Cases, Incidents, Work Orders, and Orders all extend Task, inheriting state, priority, assignment, and SLA fields.
User	sys_user	Single person record shared across all products. CSM Contacts, Sales CRM Leads, ITSM Agents, and HR Employees all reference this table. No duplicates.

**Now Platform base (continued)**

Platform object	Table name	What it does
Company	core_company	Base organization record. CSM Account and Sales CRM Account both extend this table. One company record used across all modules.
CMDB/CI	cmdb_ci	Configuration Management Database. Install Base Items reference configuration items (CI) here, linking customer product deployments to IT infrastructure.
SLA engine	contract_sla	Platform-level SLA engine shared by CSM Entitlements and Sales CRM Contracts. Provides consistent SLA behavior across Cases, Orders, and Work Orders.

**Layer 2: CRM Foundation**

The CRM Foundation is the shared data layer that all three Customer Workflow products build on. It contains the core data objects that define customers, products, and service commitments, along with the transactional objects that Sales CRM, CSM, and FSM operate on. These objects are created once and consumed by all three products without duplication.

**CRM foundation data objects**

Foundation object	Table name	What it does
Account	customer_account	Extends core_company. Central hub for contacts, cases, contracts, and opportunities. Shared across Sales CRM, CSM, and FSM.
Contact	customer_contact	Extends sys_user. Represents a person at a customer account. Used for case routing in CSM, opportunity contacts in Sales CRM, and site contacts in FSM.
Consumer	csm_consumer	Extends sys_user. Represents an individual customer in a B2C model. Interacts directly through self-service portals or assisted service channels.
Household	csm_household	Groups consumers who share an address and common products or services. Supports a designated head of household with visibility into cases and account information for all members.
Product Model	cmdb_model	Defines a product or service template. Sales CRM extends it with pricing through Product Offerings; CSM references it for case context.
Sold Product	sold_product	Tracks a product or service sold to an account or consumer. Created by Sales CRM on order fulfillment; referenced by CSM cases and FSM work orders.

### CRM foundation data objects (continued)

Foundation object	Table name	What it does
Install Base Item	alm_asset	Specific deployed instance with serial number. References a CMDB CI. Visible to agents in CSM and technicians in FSM.
Contract	ast_contract	Defines the type of support a customer receives. Created during the sales motion in Sales CRM; verified by CSM on every case to confirm support terms.
Entitlement	entitlement	Defines SLA tiers, support hours, and covered channels. Set by Sales CRM during the sales motion; auto-verified by CSM when an agent opens a case.

**Note:** The products listed in the "What it does" column highlight the primary Customer Workflow products (Sales CRM, CSM, FSM) that operate on each foundation object. Industry Workflows such as Telecom, Technology, Financial Services, Public Sector, Healthcare, Retail, and Manufacturing also inherit and use these same foundation objects through the Customer Workflow products they build on.

### CRM foundation engines

Engine/capability	What it does
Product Configuration Engine	<p>Manages product bundles, compatibility rules, and configuration options.</p> <p>Primary consumer is Sales CRM during quoting and ordering Also used by CSM during sold-product modification flows and by Industry workflows that extend Sales CRM with vertical-specific configuration logic.</p>
Pricing Engine	<p>Applies pricing rules, discounts, and rate calculations to Product Offerings.</p> <p>Primary consumer is Sales CRM during the quote and order process. Also invoked by CSM modification flows and industry workflows that price quotes and orders.</p>
Scheduling Optimization	<p>Optimizes technician scheduling and dispatch in FSM based on location, skills, availability, and SLA requirements.</p> <p>Primary consumer is FSM and is also used by Industry workflows with field operations such as Telecom and Healthcare.</p>

### Customer entities by business model

The CRM Foundation customer entities are organized into two categories: organization entities that represent companies and groupings, and individual entities that represent people. Which entities are used depends on the business model. B2B implementations use accounts and contacts. B2C implementations use consumers and households. B2B2C implementations

combine both, adding account consumers to support business customers who serve end consumers. A single deployment can support all three models simultaneously.

### Customer entities and business models

Entity type	B2B entities	B2C entities	B2B2C entities
Organization entities	Account (customer_account), Partner Account (customer_account)	Household (csm_household)	Account + Household
Individual entities	Contact (customer_contact), Partner Contact (customer_contact)	Consumer (csm_consumer), Household Member (csm_consumer)	Contact + Account Consumer (csm_consumer)

### Layer 3: Customer Workflows (Sales CRM, CSM, and FSM)

The Customer Workflows tier contains the three core CRM products at the same level: Sales CRM, CSM, and FSM. Each product operates on the shared CRM Foundation objects and adds its own product-specific objects. A record created in one product is immediately available to the others.

#### Customer Service Management (CSM)

CSM answers three questions for every service interaction: Who is the customer? What do they own? What are they entitled to? CSM uses the shared CRM Foundation objects to answer these questions. Case is the CSM-specific object that ties them together.

#### CSM-specific objects

CSM object	Table name	What it does
Case	sn_customerservice_cases	Extends Task. Central record for every service interaction. Connects Who (Account/Contact/Consumer) + What (Product/Asset) + What's Owed (Contract/Entitlement). Supports omnichannel intake.

#### Sales CRM

Sales CRM adds the full sales motion on top of the CRM Foundation, from Lead through Opportunity, Quote, Order, and Fulfillment. After fulfillment, the shared CRM Foundation objects take over. Sold Products, Contracts, and Entitlements are immediately available to CSM and FSM with no handoff required.

#### Sales CRM-specific objects

Sales CRM object	Table name	What it does	Stage
Lead	lead	Prospective customer. Converts to Opportunity +	Prospect

**Sales CRM-specific objects (continued)**

Sales CRM object	Table name	What it does	Stage
		Account/Contact on qualification.	
Opportunity	opportunity	Potential deal linked to an Account. Tracks sales stage; one-to-one with a Quote.	Qualify
Product Offering	product_offering	Extends Product Model with pricing rules, bundles, and compatibility rules.	Configure
Quote (CPQ)	quote	Priced proposal generated by the CPQ configurator. Applies pricing rules and bundles in real time	Price
Order	sn_order_mgmt_order	Confirmed purchase. Extends platform Task and triggers downstream fulfillment workflows.	Order
Fulfillment Task	sc_task	Extends platform Task. Represents individual work steps executed during order fulfillment.	Fulfill

**Field Service Management (FSM)**

FSM adds field operations capabilities on top of the CRM Foundation. Work Order is the FSM-specific object. FSM consumes shared Account, Contact, Install Base Item, Contract, and Entitlement records, so technicians arrive with the same customer context that agents and sales teams see. Scheduling Optimization from the CRM Foundation handles technician routing and dispatch.

**FSM-specific objects**

FSM object	Table name	What it does
Work order	wm_order	Extends Task. Represents a field service job dispatched to a technician. References the same account, contact, install base, and entitlement records from the CRM Foundation.

## Layer 4: Industry Workflows

The top tier provides preconfigured solutions for Telecom, Technology, Financial Services, Public Sector, Healthcare, Retail, and Manufacturing. Each industry solution extends the CRM data model with domain-specific entities, such as subscriber records for telecom, policy records for financial services, or patient records for healthcare, while inheriting every shared object and engine from the layers below.

Industry Workflows build on top of the CRM Foundation and Customer Workflows; they do not replace them. A telecom agent still works with the same Case, Account, Contact, and Entitlement objects that any CSM agent uses, but the workspace, playbooks, and data model extensions are preconfigured for telecommunications workflows. Organizations can deploy an industry solution as a starting point and modify it as requirements evolve.

### How the layers connect

The connection between Sales CRM and CSM is structural, not technical. Because both layers share the same underlying records, completing an order in Sales CRM immediately updates what CSM sees. There is no batch sync, no middleware, no delay.

- Order fulfillment in SOSales CRMM creates a Sold Product and Install Base Item in the CSM layer, available immediately for case handling.
- Contracts and Entitlements set during the sales motion are auto-verified when a CSM agent opens a Case. No manual lookup.
- Account, Contact, and Product Model records are written once and read by both layers. Changes are reflected everywhere instantly.
- FSM work orders reference the same account, contact, and install base records, so technicians see the same customer context as agents and sales teams.

This structural connection is what makes the sell, fulfill, and service story coherent. It is not a workflow between systems, it is a single data model with multiple operational views.

### Related topics

[Customer data](#) ↗

[User management](#) ↗

[Product data](#) ↗

[Data models](#) ↗

[Configure Service Model Foundation](#) ↗

## Customer data

Configure and manage the core customer records, accounts, contacts, consumers, households, and billing accounts, that agents, sales teams, and technicians rely on across the CRM portfolio. Because customer data is shared across all CRM products, a record created in one context is immediately available in another without duplication or manual transfer.

### Customer data entities

Customer data in the CRM portfolio consists of information about the people and organizations your business serves, along with the financial entities that manage billing and payments. The following entities form the core of the customer data model.

### Customer data entities

Entity	What it represents	Key characteristics
Account	A customer or partner organization that your business serves or works with.	Functions as a customer account, partner account, or both. Supports hierarchical parent-child relationships across the organization.
Contact	An individual employee of an account who interacts with your service organization.	Belongs to one account. Can be associated with multiple assets and service contracts. Can log in to the Customer Service Portal.
Consumer	An individual customer in a B2C service model.	Operates independently of a business account. Interacts with the organization through self-service portals or assisted service channels.
Household	A group of consumers who share an address and common products or services.	Groups consumers under a designated head of household. Provides visibility into cases and account information for all members.
Billing account	A financial entity that manages payment and invoicing for services, separate from the customer relationship.	Allows multiple billing arrangements per customer and consolidated billing across customers. Supports parent-child hierarchies for complex billing structures.

### Account structure and relationships

Customer data entities are connected through a set of relationships that control visibility, access, and management responsibilities across the CRM portfolio. These relationships determine which users can see which records, who can act on behalf of whom, and how organizational structures are represented in the system.

The following table summarizes every relationship type available in the customer data model.

### Entity relationships

Relationship type	What it connects	What it enables
Account hierarchy	Parent account to child accounts.	Represents the legal entity structure. Gives parent account administrators visibility and management access across all child accounts, contacts, cases, and assets.
Account relationship	Account to account or account to partner.	Creates bi-directional relationships between accounts. Allows partner accounts to manage cases and view assets on behalf of customer accounts.
Contact relationship	Contact to an account other than their own.	Associates a contact with additional accounts beyond their primary account. Enables the contact to view information and perform

**Entity relationships (continued)**

Relationship type	What it connects	What it enables
		actions on behalf of associated accounts through the customer portal.
Account team	Employees and contacts to a specific account.	Assigns responsibility definitions (roles) to internal employees and customer contacts who support a particular account. Built using the responsibility definition framework.
Consumer relationship	Consumer to consumer.	Creates an authorized representative relationship between two consumers. The authorized representative can manage cases on behalf of the other consumer.
Consumer team	Agent to consumer.	Creates a relationship manager relationship between an agent and a consumer. The agent can access and manage all cases for that consumer.
Household relationship	Consumer to household.	Adds consumers as members of a household. A consumer can belong to multiple households with one designated as primary. Supports head of household and relationship manager roles.
Asset contact relationship	Asset to contact.	Assigns specific assets to one or more customer contacts. When enabled, restricts asset visibility on the customer portal to only the assigned contacts.

**Account hierarchy**

Accounts can be organized into a parent-child hierarchy to reflect the legal or operational structure of a customer organization. A parent account provides visibility across all child accounts, allowing customer administrators to view and manage cases, contacts, and assets at any level of the hierarchy.

Each account is assigned a unique account code, and the hierarchy is tracked through an account path that combines the account codes of each account in the chain. For example, a parent company with two regional subsidiaries produces three account paths: the parent’s own code, and a parent/child path for each subsidiary.

**Account relationships**

Account relationships create bi-directional links between accounts. Each relationship has a defined type (such as “Partner of”) and an automatic reverse relationship on the target account (such as “Customer of”). These relationships allow partner accounts to report and manage cases on behalf of customer accounts, view associated assets, and coordinate service delivery.

Account relationship types are defined by the administrator and can link a customer account to another customer account, a customer account to a partner, or a partner to a partner. Deleting a relationship record automatically deletes the reverse relationship. Existing customer service cases that reference the relationship are not affected.

## Contact relationships

A contact belongs to one account, but contact relationships allow that contact to be associated with additional accounts. Through a contact relationship, a contact with the customer or customer administrator role can view information and perform actions, such as creating or updating cases from the customer portal, on behalf of the associated accounts.

When creating a contact relationship, the available contacts include those from any related partner or account, as well as contacts from the account hierarchy. Each contact relationship includes a responsibility that defines the contact's role for that account. Starting with the Zurich release, administrators can assign multiple responsibilities per account for a single contact.

## Account teams

Account teams bring together employees and customer contacts who fulfill specific roles in supporting a particular account. Teams are built using responsibility definitions, named roles that the administrator creates and assigns to team members.

There are two types of responsibility definitions: one for employees (internal users) and one for contacts (external users). Once definitions are created, the customer service manager assigns them to specific users for each account. Team members appear in the Account Team Members related list on the account record. An account team member assigned an account manager responsibility can view information and perform actions on behalf of the account through the customer portal.

## Consumer relationships

Consumer relationships connect individual consumers to each other or to agents who manage their cases. Two types of consumer relationships are available:

- Consumer-to-consumer relationships use the authorized representative responsibility. A consumer with this relationship can manage cases on behalf of the other consumer, regardless of whether they share a household.
- Consumer team relationships use the relationship manager responsibility. An agent with this relationship can access and manage all cases for that consumer.

## Household relationships

A household groups consumers who share an address and common products or services. A consumer can belong to multiple households, with one designated as the primary household. Each household can have a designated head of household who has access to all cases and information for the other household members.

Household relationships also support household teams, which are relationships between an agent and a household created using the relationship manager responsibility. Agents with this relationship can manage all cases for that household. When a household is deleted, the system clears references and associations to the household but does not delete the associated consumers, cases, or work orders.

## Asset contact relationships

Asset contact relationships assign specific assets to one or more customer contacts who are responsible for managing those assets. By default, all account and partner contacts can see all assets related to an account. To restrict visibility, administrators create asset contact relationships and enable the associated system property.

When enabled, asset visibility on the customer portal is limited to the assigned contacts: the My Assets list shows only assigned assets, and the Asset field on the Create Case form shows only assets for which the user is a contact. Asset contacts can be selected from the account that owns the asset, the partner of that account, or any contacts added through contact relationships.

**Related topics**

- [Data models](#)
- [User management](#)
- [Product data](#)
- [Customer data](#)
- [Configure Service Model Foundation](#)

**User management**

Configure internal and external users, assign roles and group memberships, and control access to CRM features and case data. Establish the user structures that support case routing, team collaboration, and portal access across the CRM portfolio.

**Users and groups**

A user is any individual who can access the CRM environment. A group is a set of users who share a common purpose. Roles and assignment rules applied to a group are automatically inherited by all members, so access and routing can be managed at the team level rather than individually. Group information is used across CRM processes for assigning work to teams and requesting approvals.

Users and groups can be imported or created directly using the platform user administration feature. After users are configured, roles are assigned to control what each user can see and do.

**Roles and access control**

Roles control access to features, capabilities, and data in the CRM portfolio. The Customer Service Management application provides two categories of roles: internal roles for agents and managers, and external roles for customers, partners, and consumers. Roles can be assigned to individual users or to groups. When assigned to a group, all members inherit those roles.

**Internal roles** are assigned to employees who handle cases, manage service operations, or support customers through the CSM Configurable Workspace.

**Internal roles**

Role	Role name	What it covers
Service agent (B2B)	sn_customerservice_agent	Handles cases on behalf of business customers. Has access to case management, customer records, and agent tools in the configurable workspace.
Consumer agent (B2C)	sn_customerservice.consumer_agent	Handles cases for individual consumers in a B2C service model. Works with consumer profiles, households, and the consumer service portal.
Service manager	sn_customerservice_manager	Oversees service operations across B2B and B2C models. Manages queues, account teams, contact relationships, and has

### Internal roles (continued)

Role	Role name	What it covers
		broader visibility across cases, teams, and performance data.

**External roles** are assigned to customers, partners, and consumers who access the CRM through self-service portals. External roles control what these users can see, submit, and manage.

### External roles

Role	Role name	What it covers
Customer (B2B)	sn_customerservice.customer	Submits and views cases through the customer portal. Can view assets and service contracts associated with their account.
Customer administrator (B2B)	sn_customerservice.customer_admin	Manages cases and contacts across their account or account hierarchy. Has broader visibility than a standard customer role.
Customer case manager (B2B)	sn_customerservice.customer_case_manager	Manages cases for their account with case management capabilities beyond the standard customer role.
Partner (B2B)	sn_customerservice.partner	Creates and manages cases on behalf of the customer accounts they support. Can view assets and service information for partner-managed accounts.
Partner administrator (B2B)	sn_customerservice.partner_admin	Manages contacts, cases, and account information across the partner's customer accounts with administrative access.
Consumer (B2C)	sn_customerservice.consumer	Accesses services through the consumer portal. Submits and tracks cases, views products, and manages personal information.

### Contributor users

Contributor users are internal or external employees who participate in resolving customer issues without full agent access. These are typically back-office specialists, middle-office team members, or employees from shared service organizations brought in for specific case tasks. The contributor user model supports unified customer support where shared service teams can serve both internal and external customers.

The contributor users feature enables three capabilities: service organizations can serve one another and external customers, employees can request support for themselves and for external customers, and middle-office agents can work on specific tasks required to resolve cases.

**Contributor roles** control what each contributor type can see and do. Each role maps to a specific requester scenario.

### Contributor roles

Contributor type	Role name	What they can do
Account contributor	sn_customerservice.account_contributor	Creates cases on behalf of any customer. Works with accounts and contacts. Uses the Customer Service Portal to assist customers.
Consumer contributor	sn_customerservice.consumer_contributor	Creates cases on behalf of any consumer. Works with consumers and households. Uses the Consumer Service Portal to assist consumers.
Relationship contributor	sn_customerservice.relationship_contributor	Creates cases on behalf of customers with whom they have an established relationship. Can view and follow up on all cases for related customers. Can update customer data such as contacts and addresses.
Self contributor	sn_customerservice.self_contributor	Creates cases on behalf of themselves as an internal employee. Uses the portal to request support for their own issues.
Service organization contributor	sn_customerservice.service_organization_contributor	Creates cases on behalf of customers associated with their service organization. Operates within the Service Model Foundation hierarchy.

**Viewer roles** provide read-only access to case data and customer records without the ability to create or modify them.

### Viewer roles

Viewer role	What it provides
Case viewer	Enables employees to view case records without the ability to create or modify them.
Case task viewer	Enables employees to view case task records without the ability to create or modify them.
Customer data viewer	Enables employees to view core customer data (accounts, contacts, consumers) without the ability to modify records.

### Account teams

Account teams bring together employees and customer contacts who fulfill specific roles in supporting a particular account. Teams are built using responsibility definitions, named roles that the administrator creates and assigns to team members. There are two types of responsibility definitions: one for employees (internal users) and one for contacts (external users).

After responsibility definitions are created, the customer service manager can build an account team by selecting an account, choosing a role, and assigning it to an employee. The manager can also add a contact relationship to an account by selecting a role and assigning it to a contact. Account team members with an account manager responsibility can view information and perform actions on behalf of the account, such as creating or updating cases from the customer portal.

## Customer access management

Customer access management enables multiple contacts and consumers to participate in a case or track a sold product, each with a defined level of access. This capability supports complex use cases across industry verticals, such as a loan application where a co-borrower, guarantor, and attorney all need access to the same case, or a product tracked by both a finance team (for renewals) and an operations team (for maintenance).

When adding related parties to a case, agents select a relationship type that determines the access level for each party. Customer access management improves the customer experience by enabling related parties to track and collaborate on cases, improves operational efficiency by enabling customers to track cases for products and services, and increases automation by automatically granting access to cases based on access to the sold product.

### Configuration tasks

Configuration task	What it does
Responsibility definition	Defines a role or responsibility that controls what a related party can see and do on a case or sold product.
Responsibility access configuration	Configures the access level for each responsibility definition using the declarative responsibility framework.
Related party configuration	Links related party entity responsibilities to responsibility definitions. Determines which relationship types are available when adding related parties to a case.

## Unified user profiles

The unified user feature allows a single individual who holds both an internal and external identity to maintain multiple profiles with one login and switch between them seamlessly. This eliminates the need to create and manage multiple user accounts for the same individual.

Before unified profiles, the platform prevented a user from holding both the `snc_internal` and `snc_external` roles simultaneously due to role collision. The unified consumer role resolves this by operating independently of both roles, enabling scenarios where an employee is also a consumer.

The following list describes some of the supported scenarios.

- An employee who is also a consumer (B2C). For example, a bank employee who also holds a personal account at the same bank.
- A user with multiple external profiles. For example, a consumer who has a patient profile in healthcare and a constituent profile in public sector services.
- A user with profiles across CSM and other ServiceNow applications. For example, a user with a CSM account for vendor support and a VRM account for vendor risk management.

Individual consumers can have multiple profiles for different needs. Consumer profiles allow organizations to identify and differentiate profile-specific data for the same user. For example, a patient profile and a constituent profile for the same individual. Each profile maintains its own data while sharing the underlying user record.

## Related topics

- [User management](#)
- [Customer data](#)
- [CSM Configurable Workspace](#)
- [AWA for CSM](#)
- [Set up self-service](#)
- [Roles installed with Customer Service Management](#)

## Product data

Product data in the CRM portfolio gives agents, customers, and sales teams a shared view of what has been sold, how it has been deployed, and what service coverage applies.

### Product data overview

When an agent opens a case, the product data associated with the customer's account tells them exactly what products are in scope, how they are installed, and what the customer is entitled to. Product data is part of the shared CRM data foundation and data model and is available across Sales CRM, FSM, CSM, and industry solutions without duplication or manual synchronisation.

Product data is part of the shared data foundation of the CRM portfolio. It connects what an organization sells to cases, work orders, and service requests raised against those products. This connection is what allows agents, technicians, and sales teams to work from a consistent view of the customer's product landscape at every stage of the customer lifecycle.

### Product data entities

The following entities make up the product data model.

#### Product data entities

Entity	What it represents	How it is used
Product model	A type of good or service that your organization sells and supports like hardware, software, a service, or a consumable.	Product models are the catalog of what your organization offers. They can be associated with service offerings that customers can request, and are referenced by sold products when a product is sold.
Sold product	A specific product or service that has been sold to an account or consumer.	Records what a customer has purchased. Supports a hierarchical structure and can be associated with contracts and entitlements. Cases can be linked directly to a sold product when an issue arises.
Install base item	An instance of a product that has been installed or provisioned for a customer.	Tracks the deployed state of a customer's products. Available to agents and technicians when resolving

**Product data entities (continued)**

Entity	What it represents	How it is used
		issues. For SaaS products, represents the application service configuration item.
Installed product	The association between a sold product and one or more install base items.	Captures how a sold product has been deployed. A single sold product can have multiple installed product records across different locations or instances.

**Product data and service delivery**

When a case is opened, an agent can identify the specific sold product or install base item affected, connecting the service request directly to the relevant product context. Install base items created by Sales CRM fulfillment flows are immediately visible in CSM, and field technicians dispatched through FSM carry the same product context on their work orders.

**Assets and service coverage**

Assets, service contracts, and entitlements extend product data into service coverage. An asset is a specific product instance supported for an account or consumer. Service contracts define the type of support a customer receives, while entitlements specify the level of support, supported channels, and SLA terms, giving agents immediate visibility into what a customer is covered for when a case is opened.

**Product data across CRM and Industries**

Product data is a foundational layer of the CRM portfolio. It is the mechanism through which what a customer has purchased becomes visible and actionable across every CRM product and industry solution.






**Product data across the CRM portfolio**

Product	How data is used
CSM	Agents use sold products and install base items to identify what is affected when a case is opened. Entitlements derived from the product and contract data determine the SLA applied to the case automatically.
Sales CRM	Order fulfillment creates sold products and install base items that are immediately available in CSM.
FSM	Field technicians dispatched through FSM carry the same product context - sold products, install base items, and assets on their work orders, giving them full visibility into what is deployed at a customer site before they arrive.
Industry solutions	Industry solutions such as Telecommunications, Manufacturing Commercial Operations, and Financial Services Operations extend the core product data model with industry-specific structures. Telecom organizations use install base items to represent network services and configurations. Manufacturers use them to track equipment deployed

### Product data across the CRM portfolio (continued)

Product	How data is used
	at customer sites. Financial services organizations use sold products to represent financial products and accounts under service.

#### Related topics

- [Data models](#) 
- [Product models](#) 
- [Create service contracts](#) 
- [Configure entitlements](#) 
- [Configure install base](#) 

## Product catalog

A product catalog defines the products and services that your organization sells and supports.

### Product catalog overview

The product catalog connects what your organization offers to the records that track what customers have purchased and the requests they can make. It is structured around product models like the types of goods and services your organization offers.

### Catalog structure

The catalog is organized in three layers that connect what an organization offers to what customers can request.

- **Product models:** Define the types of goods and services your organization sells and supports. Product models are the foundational entries in the catalog and everything else references them.
- **Service offerings:** Associated with product models to represent specific support tiers available to customers. Service offerings flow through to sold product records, giving agents visibility into a customer's entitlements when a case is opened.
- **Catalog items:** The requestable entries that customers and agents interact with. Catalog items are linked to product models through product-to-catalog item relationships, allowing customers to raise service requests directly from the products they own.

### Catalog connections across CRM

Product models in the catalog are referenced by sold products. When a product is sold, the sold product record points back to the catalog entry that defines it. Service offerings associated with a product model flow through to sold product records, giving agents visibility into a customer's entitlements when a case is opened.

In a Sales CRM context, the product catalog also underpins CPQ. The product definitions, pricing tiers, and bundling rules that CPQ enforces at the quoting stage are built on the same catalog foundation, ensuring consistency between what is sold and what is supported.

## Product catalog across CRM and Industries

The product catalog is a shared resource across the CRM portfolio and its industry solutions. Because all CRM products reference the same catalog, what is defined once is available consistently across selling, fulfillment, and service.

### Product catalog across the CRM portfolio

Product	How the catalog works
CSM	Agents use catalog items to raise service requests on behalf of customers. Knowledge bases and service offerings in the catalog can be configured with product entitlements so that customers and agents see only the items relevant to what has been purchased.
Sales CRM and CPQ	The product catalog is the foundation for quoting and ordering. CPQ enforces product definitions, pricing tiers, and bundling rules defined in the catalog at the quoting stage. When an order is placed, the sold product record references the catalog entry that defined it.
Self-service portals	Customers interacting with the Customer Service Portal can view their purchased products and raise service requests directly from the catalog items associated with those products, without agent involvement.
Industry solutions	Industry solutions extend the product catalog with vertical-specific product models and service offerings. Telecommunications organizations use the catalog to define network services and bundles. Manufacturers define equipment and warranty offerings. Financial services organizations define financial products available for self-service requests.

## Service Model Foundation

The Service Model Foundation (SMF) framework enables you to model your business organization structure, customer organizations, and the relationships between them.

### SMF overview

The service model foundation defines and connects the core entities in the customer service value chain: service organizations, business locations, staff members, and the relationships between them. It extends the customer service data model to support complex organizational structures, including those with internal and external locations, franchise networks, dealer relationships, and Business-to-Business-to-Consumer (B2B2C) service models.

### SMF benefits

SMF provides benefits to organizations that manage complex service delivery across multiple domains.

- **For service agents and fulfillers:** Service Model Foundation reduces the effort required to navigate and act on service requests by providing a unified data model. Agents and fulfillers can access assignment details, related assets, location information, and task dependencies from a single record without switching between applications. The structured task hierarchy ensures that work is tracked and escalated consistently across service domains.
- **For administrators and configuration teams:** Administrators can extend the foundation to meet domain-specific requirements without rebuilding the structures, reducing configuration overhead and maintaining consistency across implementations. Common service entities

such as skills, territories, and service contracts are centrally managed and reused across workflows.

- **For implementation partners and architects:** The shared data model reduces duplication across applications. This enables faster implementation and simplifies the design of cross-domain workflows.

## Products and contexts

The service model foundation operates across CRM products and adapts to a range of deployment contexts.

### SMF across the CRM portfolio

Product	How SMF works
CSM	Underpins case routing, account hierarchy modeling, and agent access control within the CSM workspace.
B2B2C scenarios	Models both the business relationship and the consumer relationship within a single framework, supporting intermediary service models.
Contracts and entitlements	Service contracts and entitlements complement SMF by defining customer support terms and automatically applying the applicable SLA when a case is opened.
B2E (Business to Employee)	SMF supports scenarios where internal employees act as consumers of a service, such as a corporate retailer where store staff raise cases for in-store facilities through the same platform used for customer service.
B2B2E	Similar to B2B2C, the business supports its own employees instead of end consumers. For example, a franchisor providing a service channel through which franchise owners raise and manage cases on behalf of their store staff.
Industry deployments	Supports financial services, manufacturing, and retail models where complex location and responsibility hierarchies are common.

## Use cases

### Retail

A retail franchise network with hundreds of outlet locations uses the BOSC persona to allow individual franchise owners to create and manage cases for their stores directly. Each franchise owner sees only their own location's cases and assets. The franchisor retains consolidated visibility across all locations for SLA and case tracking.

- **Note:** BOSC (Business Organization Self Contributor) is a role for front-line and location-based workers. This role enables self-service case management for business partners with access scoped to their location.

### Manufacturing

A manufacturing company operating through an authorized dealer network configures external business locations for each dealer. Dealers can create warranty cases and service requests on behalf of their customers, scoped to the products and entitlements associated with their dealership. The enterprise gains a unified view of dealer-initiated cases alongside direct customer cases, with responsibility definitions linking regional account managers to the dealers they oversee.

### Financial services

A financial institution configures internal business locations for each of its regional branches. Agents are assigned to their branch location, giving them access to cases for customers served at that branch. Relationship definitions connect personal relationship managers to the individual accounts they manage, providing targeted access to those customers' cases regardless of which branch the customer visits.

### Related topics

- [Service Model Foundation overview](#)
- [Configure Service Model Foundation](#)
- [Service Model Foundation business locations](#)

## Partner Relationship Management

Partner Relationship Management (PRM) enables enterprises to onboard channel partners, manage ongoing partner relationships, and collaborate with partners on sales opportunities, orders, and quotes.

### PRM overview

PRM extends the Sales CRM portfolio to support indirect sales, where partners sell and support customers on behalf of the enterprise. It provides the data model, workspace tools, and sales capabilities that enterprise teams and channel partners need to manage the full partner lifecycle, from onboarding through deal execution.

The partner workspace, built on the CSM Configurable Workspace, gives enterprise teams a central place to create and manage channel partner records, view partner cases and activity, and manage partner programs and program relationships. Channel partners can manage opportunities, generate quotes, and submit orders through partner-facing versions of the Sales CRM sales tools, using the same platform data model as the rest of the CRM portfolio.

Segment Management works alongside PRM to group partners into segments that reflect their tier, specialization, or market focus. Segments can be linked to partner programs, allowing the enterprise to tailor program benefits and requirements to specific partner categories at scale.

### Core entities

The following entities are the foundation of PRM.

#### PRM entities

Entity	What it represents	How it is used
Channel partner	An external organization that sells or supports products on behalf of the enterprise.	Channel partner records capture all information related to a specific partner, their programs, cases, and relationships. Enterprise teams and partner managers work from these records in the partner workspace.
Partner program	A structured program that defines the terms under which channel partners engage with the enterprise.	Organizes partners into tiers or categories based on their relationship with the enterprise, including specific benefits,

**PRM entities (continued)**

Entity	What it represents	How it is used
		requirements, and deal registration rules.
Partner program relationship	The association between a channel partner and a partner program.	Establishes which programs a partner participates in and governs the terms of that participation.
Deal registration	A formal record submitted by a channel partner to claim exclusive rights to pursue a specific customer opportunity.	Gives partners a transparent, structured way to register deals and convert them to opportunities, tracked through the CRM system.

**Partner workspace and sales capabilities**

The partner workspace provides enterprise teams with tools to create and manage channel partner records, view partner cases and activity, manage partner programs, and establish program relationships. Because the partner workspace is built on the CSM Configurable Workspace, it shares the same configuration framework and data model as the rest of the CRM portfolio.

PRM also extends the Sales CRM lead-to-cash process to indirect sales channels. Channel partners can manage opportunities, generate quotes, and submit orders through partner-facing versions of the Sales CRM sales tools. Deal registration gives partners a structured way to claim exclusive rights to a customer opportunity and convert registered deals into opportunities tracked through the CRM system.

**Segment Management**

Segment Management groups partners into segments or categories that reflect their tier, specialization, or market focus. Segments can be linked to partner programs, allowing the enterprise to tailor program benefits and requirements to specific partner categories at scale. This enables consistent program governance across large and complex partner ecosystems without managing each partner relationship individually.

**Partner Relationship Management benefits**

PRM provides benefits to internal users across an organization.

- **Enhances partner experience:** Support partner onboarding and life cycle management to provide an improved interaction system between channel partners and enterprises. This increases partner satisfaction and reduces onboarding time.
- **Increase sales and revenue:** Streamline and improve collaboration between enterprises and their partners to increase partner sales and performance to enable higher partner-initiated revenue and efficient deal conversion rates.
- **Increase operational efficiency:** Provide visibility into the partner ecosystem and enable partners to achieve their business goal to decrease manual intervention and increase partner self-service.

**Use cases**

**Technology reseller: structured partner support**

ABC Systems, a global technology reseller and implementation channel partner for XYZ Solutions, operates across North America with hundreds of active customer engagements. ABC's consulting and delivery teams frequently encounter challenges requiring direct support from XYZ, such as clarification on licensing models or product configurations. Without a structured servicing and collaboration system, partners experience delays, inefficiencies, and friction that impact both partner satisfaction and business outcomes.

With the Partner Relationship Management solution, ABC can submit and manage support cases through the Partner Portal, benefit from a role-based experience where channel partner managers and associates can independently raise cases and monitor status, gain visibility into program participation and support activities through personalized dashboards, and use the unified partner data model to confirm that entitlements and participation in XYZ's partner programs are accurately tracked and easily accessible.

With the Partner Relationship Management solution, XYZ can view and fulfill cases raised by ABC in a centralized workspace, route assignments to the appropriate support agents, and track channel partner engagement levels within ABC via real-time dashboards. By streamlining support and collaboration through PRM, ABC reduces its resolution time, improves internal efficiency, and strengthens its partnership with XYZ.

## Related topics

[Configure Partner Relationship Management](#) 

[Partner Workspace](#) 

[Deal Registration](#) 

[Configure Segment Management](#) 

## Workspace experience

The workspace experience applications give administrators and implementation partners the tools to shape how agents, technicians, and other CRM users interact with the platform. These applications are available as separate installs from the ServiceNow Store and work across Customer Service Management, Field Service Management, Sales CRM, and industry solutions.

### In this section

#### Configurable Workspace

Understand how CSM Configurable Workspace provides a unified, configurable environment for agents to manage cases, access customer information, and use resolution tools, all without leaving the workspace.

#### Playbooks

Understand how playbooks embed structured process guidance directly into the workspace, guiding agents and technicians through defined stages, activities, and guided decisions for each case or work type.

#### Customer Central

Understand how Customer Central provides a view of the customer's details and service history for different types of records in a configurable workspace, including including cases, interactions, accounts, contacts, and consumer records.

#### Recommended Actions

Understand how Recommended Actions displays relevant, actionable guidance to users directly within a configurable workspace, such as contextual actions, guided decisions, rule-based and AI-driven recommendations, and AI Search.

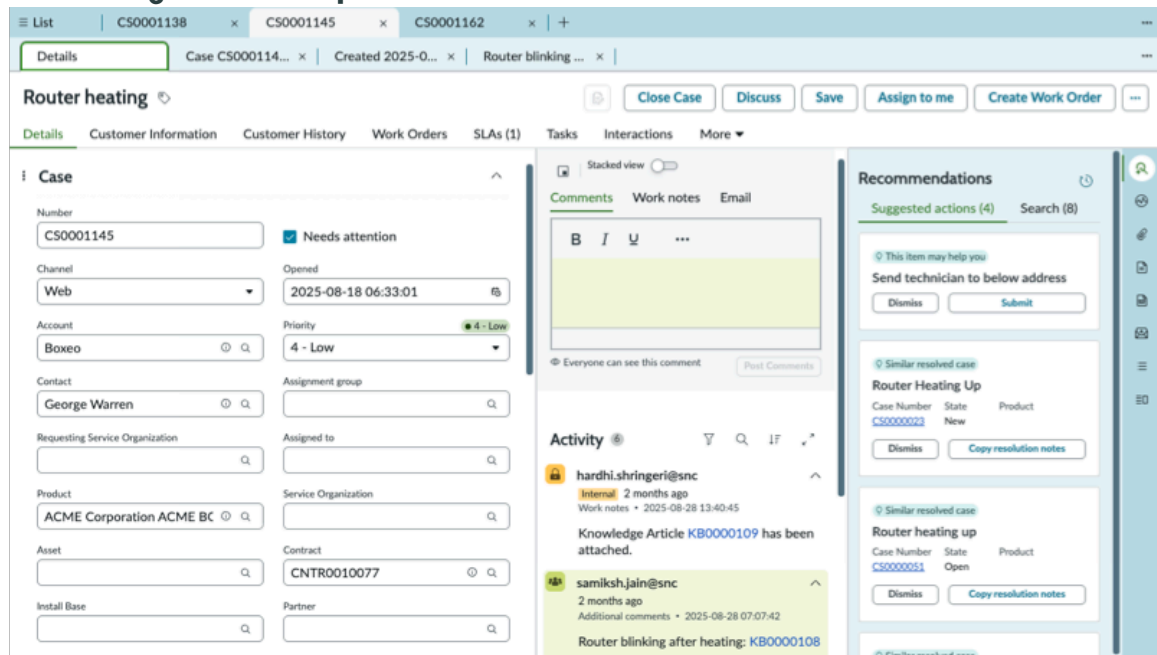
## Configurable workspace

Configurable workspace is a user interface that provides users with the tools and information they need to assist customers. Workspaces use role-based layouts, components, and communication channels to support agent, fulfiller, and technician workflows across Sales CRM, CSM, FSM, and industry solutions.

## Configurable workspace overview

Configurable workspace is a flexible interface that displays tools and information for the tasks that a user needs to accomplish. The pages that appear in a workspace, such as landing pages, dashboards, and record pages, and the components that appear on a page, including record details, contextual side panel, and playbooks, are configured in UI Builder to support the user roles and the workflows of each organization.

### CSM Configurable Workspace



Configurable workspace is built on a shared component registry, which means that capabilities configured for one product context can be made available in others across the CRM suite. Configurable workspace serves as the primary interface for agents, fulfillers, and technicians in Sales CRM, CSM, FSM, and industry solutions built on the ServiceNow platform.

## Configurable workspace benefits

Configurable workspace provides benefits to internal users across an organization.

- **For agents, fulfillers, and technicians:** Record pages in a configurable workspace can reduce the time agents, fulfillers, and technicians spend to understand record context and locate information. Customer details, case or work order history, SLA status, communication tools, and resolution guidance are available in a single interface without having to switch screens. The workspace configuration directly shapes what these users see and how efficiently they can respond.

- **For administrators and implementation partners:** Configurable workspace provides configuration options based on unique workflows and user tasks. Case types, roles, and product lines can have independent record pages with their own layouts and components, all managed within UI Builder. New record pages can be created from templates or existing pages and configured independently without modifying existing configurations.

## Products and contexts

Each product within the CRM portfolio uses configurable workspace as the foundation for its primary work interface.

### Sales CRM

Sales CRM users use configurable workspace to manage leads, opportunities, quotes, and orders across the sales cycle. Administrators can configure workspace record pages by roles such as sales rep, sales ops, fulfiller, or support agent to surface the objects and actions most relevant to each persona. Components such as Customer 360, which surfaces account details, open quotes, order history, contracts, install-base items, and entitlements, gives users full visibility into the customer relationship at every stage, from pre-sale through fulfillment.

### CSM

Customer service agents use configurable workspace to manage cases, customer interactions, and service operations. Administrators can configure workspace record pages by case type, role, and communication channel to reflect the organization's service model. Components such as Customer 360, which surfaces customer account details, case history, and installed products, can be added to record pages where the underlying customer data supports it.

### FSM

Configurable workspace serves both dispatchers managing work order queues and field service technicians working from mobile devices. Both experiences are configured in UI Builder using the same framework as CSM, which means administrators managing both CSM and FSM configurations work within a consistent toolset.

### Industry solutions

Telecommunications, financial services, and manufacturing solutions include preconfigured workspace page layouts, components, and playbooks tailored to the workflows common in those industries. Organizations can deploy these preconfigured experiences as a starting point and modify them in UI Builder as requirements evolve.

## Use cases

### Customer service: communication channel interactions

A customer service organization creates separate workspace record pages for agents handling interactions from different communication channels, including chat, voice, and email. Each record page uses a layout designed for efficient customer communication. For example, chat interactions put the chat component in the center of the workspace and display the chat history alongside. Voice interactions include a voice component that can be integrated with Contact Center as a Service (CCaaS) providers.

When customer service agents field interactions with customers, the workspace automatically displays the right record page for the channel type so agents can engage with customers, gather information, and reach resolutions faster.

## Field service: telecommunications

A telecom provider uses configurable workspace to support both a central dispatch team and field technicians. Dispatchers see a landing page oriented around work order queues and SLA exposure. Technicians see a mobile-optimized workspace with work order details, customer history, and parts availability.

Both experiences are configured and maintained within the same UI Builder application, which enables a single administrator to manage workspace configurations for both teams without context-switching between different tools or frameworks.

## Financial services: consumer banking

A retail bank configures separate workspace layouts for agents handling current accounts, mortgages, and credit card cases. Each case type has its own record page, components, and contextual side panel configuration. The mortgage complaint case type includes a playbook that guides agents through the bank's complaint handling process, components that surface escalation status and active SLA, and a Customer 360 panel showing the customer's account and interaction history.

When the bank adds a fraud disputes team, the implementation partner configures a new record page for the case type, with its own playbook, routing rules, and landing page, without modifying existing configurations for other product lines. Advanced Work Assignment routes incoming fraud cases to agents with the appropriate skill designation.

## Manufacturing: after-sales service

A manufacturer uses an industry solution workspace preconfigured for after-sales service operations. The implementation team deploys the preconfigured layouts for the case management and field dispatch teams, then modifies the ribbon component configuration for the field team to surface installed product records and warranty status relevant to their work. The preconfigured playbooks are retained for standard warranty cases and extended for the manufacturer's escalation workflows using UI Builder.

## Related topics

### Related topics

[CSM Configurable Workspace](#) 

[CSM Configurable Workspace features](#) 

[CSM Configurable Workspace record pages and page templates](#) 

## Playbooks

Playbooks are structured workflows that guide users, agents, and technicians step-by-step through the activities required to complete a business process. They are available as discrete applications for Sales CRM, Customer Service Management (CSM), Field Service Management (FSM), and individual industry solutions, and are installed separately from the core CRM products.

## Playbooks overview

A playbook is a structured process attached to a record, typically a case or a work order, that guides the user working on it through a defined sequence of stages and activities. Because playbooks are associated with specific record types, the correct process is applied automatically

based on the nature of the work. A complaint case opens with the complaint handling playbook; a work order task opens with the corresponding field service playbook.

### Playbook with horizontal stages

**CS0001026** *Product case playbook* **Priority 4 - Low** **State New** **Account PepsiCo** **Contact Debra Sue**

Intake | Investigate | **Work in progress** | Resolve and close

**Activities**

- Gather case details** (Active)
- Gather additional information
- Confirm contact details

**Complete**

### Gather case details

Number: CS000102 | Service: [ ]

Account: PepsiCo | Channel: Web

Contact: Debra Sue | Opened: 2024-06-1

Product: [ ] | Parent: [ ]

Category: Issue | Priority: 4 - Low

Subcategory: Question

Assignment group: [ ] | Assigned to: [ ]

Short description: [ ]

Description: [ ]

**Contact**

**Debra Sue**

Account: PepsiCo | Mobile phone: (650) 987-9675

Business phone: (408) 234-6701 | Email: debra.smith@example.com

**Activity stream**

Activity: maint · State N... 38 minutes ago

A playbook is organized into stages and activities that progress sequentially based on conditions set by an administrator. Each stage contains a group of activities to complete before the process moves forward. Activities can be manual tasks or form entries, automated system actions that run without agent input, or guided decisions that present structured questions and branch to a recommended next action based on the response.

**Note:** This topic covers playbooks at a conceptual level. Configuration details, including how to create stages, define activities, build decision trees, and associate playbooks with record types, are covered in the product-specific configuration documentation for each CRM product.

## Playbooks benefits

Playbooks ensure that the correct process is applied consistently across every record, regardless of which agent or technician is handling it.

- **For agents, fulfillers, and technicians:** Playbooks eliminate the need to know a process from memory or consult separate documentation. Stage-by-stage guidance, activity checklists, and status indicators keep users focused on the right task at the right time. When a decision needs to be made, a guided decision activity surfaces the relevant questions and presents a recommended action directly within the playbook.
- **For administrators and implementation partners:** Playbooks provide a controlled way to encode process knowledge into the platform, moving compliance requirements, escalation criteria, and documentation obligations into the system where they are applied automatically. Administrators can update a process by modifying the playbook configuration, and the change takes effect immediately for all subsequent records. Predefined playbooks can be deployed as-is or extended to match organizational workflows without modifying underlying case or work order configurations.

## Use cases

### Sales CRM: lead engagement

A sales organization configures playbooks to guide representatives through structured, multi-step outreach plans for leads and prospects. Automated activities handle routine steps like sending follow-up emails, while configured activities define when sales representatives should call, message, or engage through other channels. Each record that meets a trigger condition automatically starts a sequence and generates a task for the assigned representative, so outreach progresses consistently without manual tracking.

Sales CRM includes predefined playbooks for customer engagement sequences and return merchandise authorizations. Sales CRM also incorporates case management applications within its playbooks.

### Customer Service Management: case management

A customer service organization configures playbooks for different case types, each reflecting the specific stages and activities agents need to complete for that type of request. Automated activities handle routine steps like sending acknowledgement emails, while configured activities can be customized to guide agents through the work of investigation and resolution. The corresponding playbook appears automatically in the workspace when an agent opens a case of that type.

Playbooks for Portals extends this further by enabling a customer-facing version of the guided experience. Instead of an agent being walked through a case, the customer is guided through a self-service intake process on the portal, with their case held in Draft state until they complete and submit it. CSM includes several predefined playbooks, such as onboarding, complaints, and product support cases.

### Field Service Management: work order fulfillment

A utilities company configures playbooks to guide technicians through the activities required to complete work order tasks, from troubleshooting and parts retrieval through work verification and closure. Each stage includes activity checklists and status indicators so technicians can track progress without losing context.

Technicians working in the field can access playbooks directly from the Now Mobile Agent application under a selected work order task. FSM includes predefined playbooks for work order task management, covering workflows

such as appointment booking, parts and asset usage, service order tasks, and questionnaires, available on both desktop and the Now Mobile Agent.

### **Financial Services Operations: loan processing**

A lending institution configures playbooks for loan deferment and forgiveness cases covering acknowledgement, investigation, resolution, and closure, with automated notifications on case creation and configured activities guiding agents through eligibility assessment and approval. A guided decision in the investigation stage recommends the appropriate resolution path based on the applicant's loan status, and can be maintained separately so eligibility criteria can be updated as policy changes.

FSO includes a broad set of predefined playbooks covering card operations, complaint management, onboarding, loan and deposit operations, and insurance servicing.

### **Healthcare and Life Sciences: medical device management**

A healthcare organization configures playbooks to guide clinical engineers through the review and processing of AEM requests for medical devices, from initial request capture through assessment, regulatory review, and final approval. At each stage, configured activities ensure the required documentation and sign-offs are completed before the process can advance. Healthcare and Life Sciences includes predefined playbooks for enrollment cases and medical device workflows in the Patient Support Services and Healthcare CMMS applications.

### **Public Sector Digital Services: government service delivery**

A government agency configures playbooks for benefit applications, license renewals, and non-emergency service requests, each reflecting the stages and activities agents need to complete for that case type. Guided decision activities branch based on constituent responses to recommend the correct next action.

Administrators can also configure optional activities that agents can insert during a playbook run when a case requires it. For example, scheduling a follow-up appointment or requesting additional documentation from a constituent. The corresponding playbook appears automatically in the workspace when an agent creates a case, or when a constituent submits a request through the Government Service Portal. Public Sector Digital Services includes predefined playbooks for social benefits, license and permit, information request, and service request cases.

**i Note:** Playbook applications must be installed separately from the core CSM and FSM products. They are available from the ServiceNow Store. Some applications have dependencies on additional plugins. For example, Case Playbooks for Onboarding and Complaints require the Customer Service Case Types plugin (`com.snc.csm_case_types`) and the Customer Service Case Action Status plugin (`com.snc.csm_action_status`). Review the application listing in the Store for full dependency and licensing information before installation.

### **Related topics**

[Playbooks for Field Service Management](#) 

[Playbooks for Financial Services Operations applications](#) 

[Playbooks for Public Sector Digital Services](#) 

[Configuring playbooks for Patient Support Services](#) 

[Customer Engagement Sequences](#) 

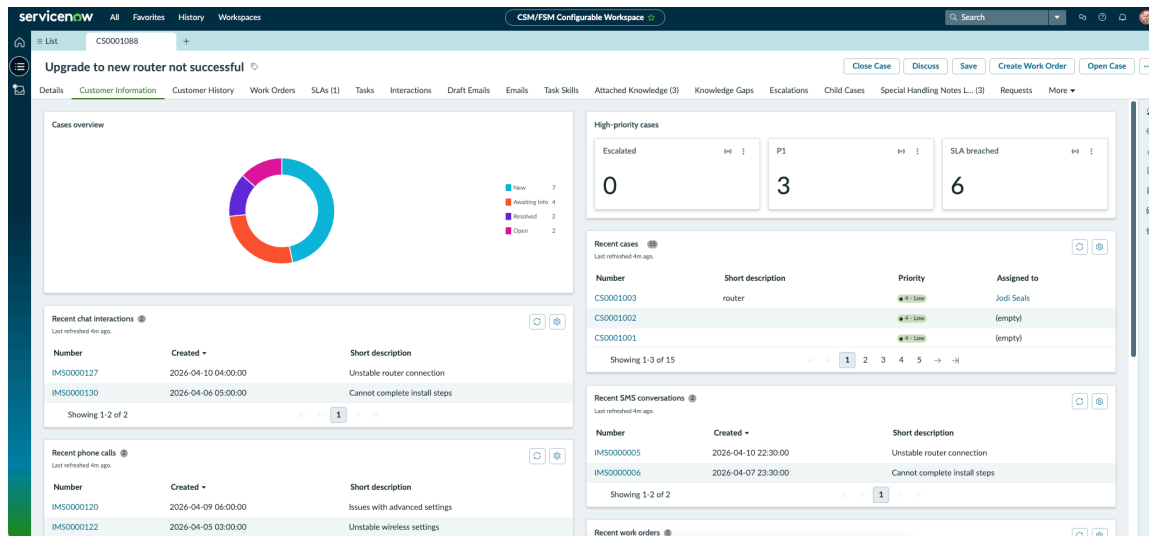
## Customer Central

Customer Central gives users a view of a customer's details and recent service history within a configurable workspace.

### Customer Central overview

Customer Central provides customer data directly on the records that agents and fulfillers work with in a configurable workspace, including cases, interactions, accounts, contacts, and consumer records. When a user opens an escalated case, for example, the account details, contact information, recent cases, and interaction history are already surfaced on the record. The user can see what has been attempted previously and avoid asking the customer to repeat information.

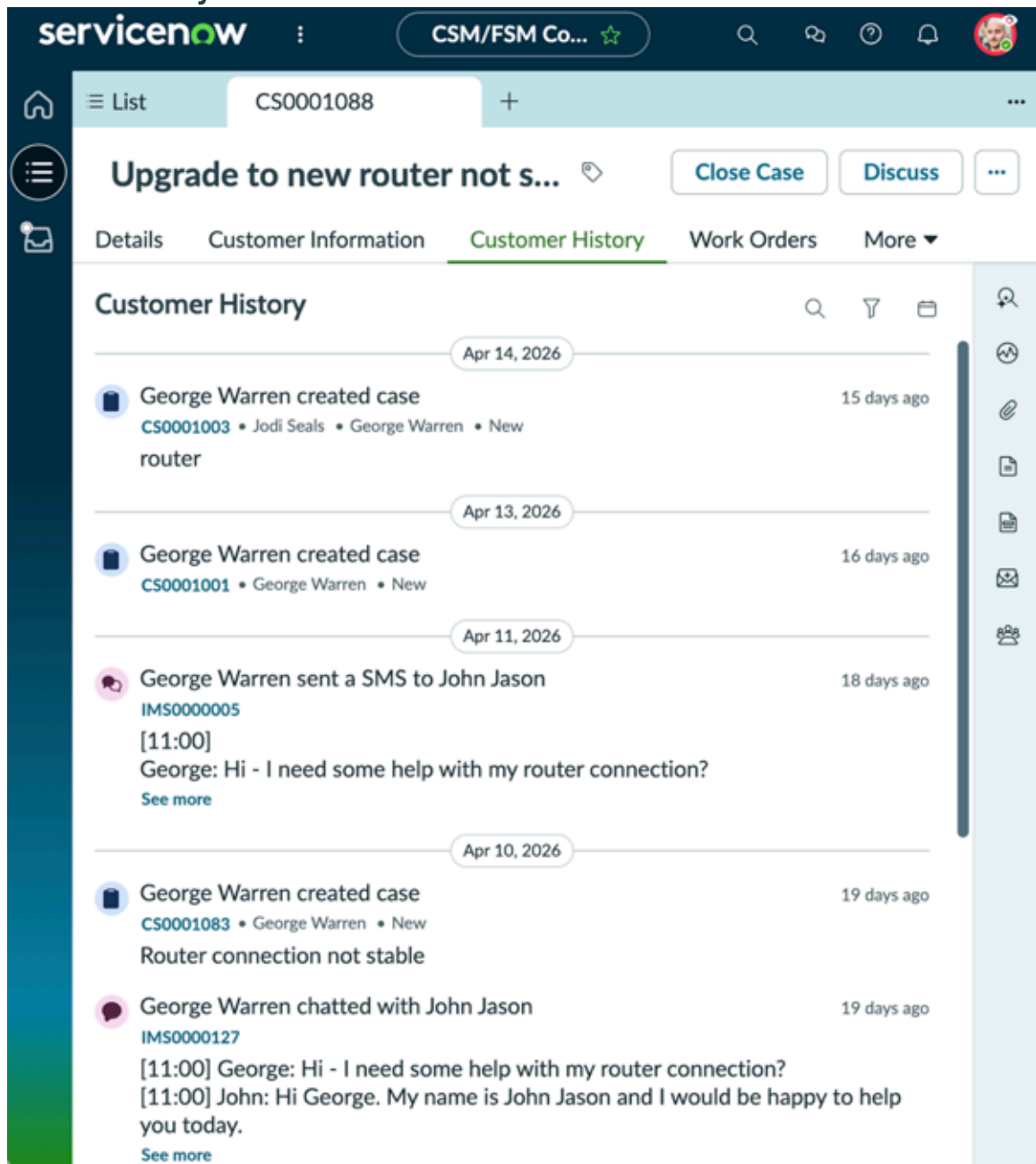
#### Customer Information view



Customer Central presents this information in two views: Customer Information and Customer History.

- Customer Information:** Provides users with a snapshot of who the customer is and how they have engaged with the service organization. It displays key details such as contact information, account details, and recent cases, alongside a summary of the customer's interactions. Administrators configure what information appears in this view and the date range of the data displayed.
- Customer History:** Displays a customer's recent interactions with the service organization, giving users a clear timeline of the customer's service journey. The feed updates in real time, so users always see the latest activity for the customer they are helping. Users can access the customer history from the case record page without leaving the record. Users can also search the history by keyword or filter by category to narrow the results to what is most relevant to the issue at hand.

Customer History view



### Customer Central benefits

Customer Central provides benefits to internal users across an organization.

- For agents, fulfillers, and technicians:
  - Customer details and service history are available on the record being worked on, without switching screens.
  - The Customer History feed updates in real time, so users always have the most current picture of the customer they are helping.
  - Search and filter controls let users quickly focus the history feed on what is relevant to the current case.
- For administrators:

- Both views are configurable to match the organization's service model and the needs of different user teams.
- New enhancements are delivered through the ServiceNow Store app, independently of the platform release cycle.

## Use cases

### **Customer Service Management: giving agents immediate customer context**

When an agent opens a case or interaction record, Customer Central is already there. Account details, contact information, recent cases, and interaction history are all visible in the record view, so the agent can orient themselves to the customer's situation before responding, without having to search separately or ask the customer to repeat themselves.

### **Customer Service Management: reviewing a customer's service history during an active case**

The Customer History view gives agents a picture of how the customer has interacted with the service organization over time. An agent handling an escalated case can filter the history to open cases, review what has been attempted previously, and pick up the conversation from where it left off. This helps agents resolve cases more efficiently and deliver a more informed service experience.

## Related topics

[Customer Central](#) 

[Configuring the Customer History component](#) 

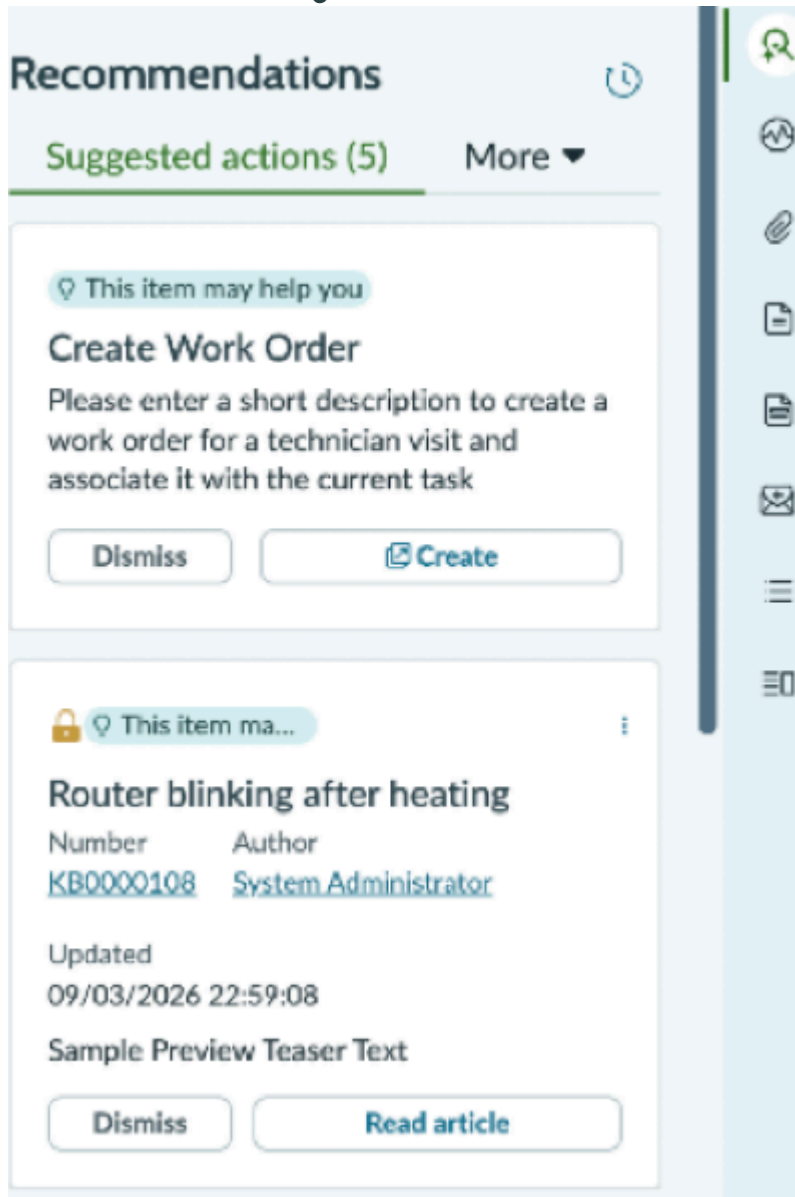
## Recommended Actions

Recommended Actions is a context-aware recommendation framework that displays relevant, actionable guidance to users directly within workspaces based on the context of the record they are working on. It acts as a one-stop experience that combines contextual actions, guided decisions, rule-based and AI-driven recommendations, and AI Search to help users resolve issues faster and more consistently across workflows.

### **Recommended Actions overview**

Recommended Actions is a configurable component that evaluates the active record (such as a case, incident, or interaction) against configurable rules and surfaces contextually relevant recommendations automatically in the contextual side panel of supported workspaces to agents. These recommendations can include guidance cards with actions, guided decision trees, field-level suggestions, and AI Search results. It is designed as a horizontal platform capability, meaning it works across multiple products and workflows rather than being limited to a single application.

## Recommended Actions guidance cards



The Suggested actions tab in Recommended Actions surfaces context-aware, actionable recommendations that agents can take directly to progress or resolve a record, such as applying resolutions, linking related records, or initiating guided actions. These suggestions are generated based on record context, configured rules, and underlying resource generators, ensuring that only relevant actions appear at the right stage of the agent's workflow.

AI search in Recommended Actions is built on the AI Search framework, which combines vector-based semantic search with traditional keyword matching to retrieve results from knowledge bases and similar case repositories. Matching logic evaluates contextual inputs from the active record, such as short description, category, and customer details, against indexed content and scores results according to the configured relevancy model.

### Recommended Actions benefits

Recommended Actions provides benefits to internal users across an organization.

- Improves agent productivity by surfacing the right actions at the right time without manual searching.
- Reduces time to resolution (MTTR) through proactive and contextual guidance.
- Provides consistency in resolution by promoting proven actions such as applying resolutions from similar cases or attaching relevant knowledge.
- Supports extensibility and low-code configuration, enabling admins to tailor recommendations using rules, contexts, and guidances.
- Unifies multiple recommendation types (rule-based, ML-based, and GenAI-driven) in a single experience.

## Products and contexts

Recommended Actions is available across the CRM solution, with each product context supporting independent configuration of knowledge sources and search behavior.

### CSM

Customer service agents use Recommended Actions to identify resolution paths for cases across service categories. Administrators can configure the component for each case type, connecting the relevant knowledge bases, setting contextual inputs such as case short description and category, and applying dynamic filters to restrict results by product, language, or support tier. Similar case results can be enabled alongside knowledge articles so agents can view how comparable cases were resolved.

### FSM

Field service technicians and dispatchers use Recommended Actions to access service procedures, equipment manuals, and resolution guides relevant to the active work order. The component can be configured with work order fields, such as asset type, failure code, and location, as contextual inputs, so returned results reflect the specific equipment and issue being addressed. Administrators can configure separate instances for dispatcher and technician record pages with distinct knowledge sources and filter criteria for each role.

### Sales CRM

Sales CRM users can use Recommended Actions to surface product documentation, pricing guidance, and resolution steps relevant to active orders and cases. Administrators configure the component with order and account fields as contextual inputs to return content appropriate to the sales or fulfillment context.

### Industry solutions

Telecommunications, financial services, and manufacturing solutions include preconfigured Recommended Actions setups tailored to the knowledge sources and workflows common in those industries. Organizations can deploy preconfigured configurations as a starting point and modify the knowledge sources, contextual inputs, and relevancy settings in UI Builder as requirements evolve.

## Use cases

### Customer service: tiered support operations

A customer service organization operates separate tier-1 and tier-2 teams, each with access to different knowledge bases. Administrators configure two Recommended Actions instances: one for the tier-1 record page, pointing to the general product knowledge base, and one for the tier-2 page, pointing to the advanced technical

repository. Dynamic filters restrict tier-1 results to articles marked for general support audiences, while tier-2 results surface technical procedures and engineering notes.

When tier-1 agents receive cases, Recommended Actions returns relevant general resolution guidance without surfacing advanced content intended for specialist teams. When cases are escalated to tier-2, agents see the technical articles and similar cases appropriate to the complexity of the issue.

### **Field service: telecommunications**

A telecom provider uses Recommended Actions on work order record pages in the FSM Configurable Workspace to help field technicians locate installation and fault-resolution procedures on-site. The component is configured with equipment type, fault code, and service area as contextual inputs. Dynamic filters restrict results by equipment model and certified procedure status.

When a technician opens a work order for a fiber splice fault, Recommended Actions returns procedures specific to that equipment model and fault type. The technician can review the steps, mark the procedure as used, and attach it to the work order, all without leaving the record page or navigating to a separate knowledge portal.

### **Financial services: consumer banking**

A retail bank configures Recommended Actions for agents handling mortgage complaint cases in the CSM Configurable Workspace. The component is connected to the bank's complaint resolution knowledge base and a repository of regulatory guidance. Contextual inputs include complaint category, product type, and SLA status. A relevancy threshold is set to suppress low-confidence matches that could mislead agents working within regulatory constraints.

When agents open complaint cases, Recommended Actions surfaces the applicable resolution procedures and regulatory requirements for the specific complaint and product type. Agents can apply guidance directly from the component without consulting a separate reference system, reducing average handling time and supporting consistent application of regulated procedures.

### **Related topics**

[Recommended Actions](#) 

[Configuring the Recommended Actions application](#) 

[Configuring AI search in Recommended Actions](#) 

[Example configurations of recommended actions](#) 

## **Self service**

The self service applications give customers, consumers, and partners the tools to resolve issues, track their cases and orders, access knowledge, and manage their own service relationships without contacting an agent. These applications are available as separate installs from the ServiceNow Store and are built on the same CRM data model that agents use in the workspace.

### **In this section**

#### **Self-service portals**

Understand how the Customer Service Portal, Consumer Service Portal, and Business Portal provide configurable self-service environments for B2B customers,

B2C consumers, and organizations that need a richer out-of-the-box portal experience.

**Omnichannel**

Understand how CRM connects customers and agents across multiple communication channels, including email, chat, telephony, and messaging, within a single unified service experience.

**Web embeddables**

Understand how web embeddable components allow organizations to surface ServiceNow CRM capabilities, such as case submission, knowledge search, and virtual agent, directly within external websites and digital properties.

**Self-service portals**

Self-service portals are customer-facing websites in ServiceNow that provide an online place for customers to get information and support. They help customers help themselves by finding answers, submitting requests, and tracking progress, without needing to contact an agent for routine needs.

Four portals are available with the CRM products:

- Customer Service Portal: supports B2B customers.
- Business Portal: supports B2B customers.
- Consumer Service Portal: supports B2C customers.
- Consumer Portal: supports B2C customers.

These portals include ready-to-use structure and navigation with minimal setup required.

**Self-service portal applications**

ServiceNow CRM includes four portal applications, each designed for a different customer relationship model. All four are built on the same Service Portal framework and draw on the same CRM data model that agents work with in the workspace. All portals offer the same self-service and Virtual Agent assistance features.

**Self-service portal applications**

Portal	Service model	What it provides
Customer Service Portal	B2B	Gives business contacts the ability to create and track cases, view sold products and install base items for their account, and access knowledge and the service catalog.
Business Portal	B2B (extended)	Extends the Customer Service Portal with a richer default layout, including taxonomy-based navigation, list views, and record detail pages. Installed automatically with the Customer Service Portal from version 24.0.0 onward.
Consumer Service Portal	B2C	Provides individual consumers with equivalent self-service capabilities, case creation and tracking, sold product visibility, knowledge access, and service catalog.

### Self-service portal applications (continued)

Portal	Service model	What it provides
Consumer Portal	B2C (extended)	Extends the Consumer Service Portal with a richer default layout, including taxonomy-based navigation, list views, and record detail pages. Installed automatically with the Consumer Service Portal from version 24.0.0 onward.

### Self-service portal capabilities

Default portal experiences help organizations provide information and support through a ready-to-use self-service portal with minimal setup. Organizations can tailor the portal to match their branding, navigation, content, and access settings.

All portals include list pages and record view pages for browsing and viewing records. The table describes what each capability provides and how the default portal supports it.

### Self-service portal capabilities

Capability	What it provides	How the default portal supports it
Case and request management	Customers can submit requests, track case status in real time, and update open cases without contacting an agent.	Portals include list pages to browse, search, and filter records, and record view pages to see details, related actions, and links.
Knowledge base	Customers can search knowledge bases before submitting a case. Bases can be filtered by product entitlement so each customer sees relevant articles.	Portals unify knowledge and catalog browsing into a single, structured experience using taxonomy topics, with search enabling quick access to relevant knowledge articles across the portal.
Service catalog	Customers can browse and select catalog items to create a case automatically, without agent review or rerouting.	Portals unify knowledge and catalog browsing into a single, structured experience using taxonomy topics, with search enabling quick access to relevant catalog items across the portal.
Virtual Agent chat	AI-assisted conversations handle common requests, such as password resets, status updates, and routine service requests, without agent involvement.	Portals can be configured to include a Virtual Agent chat interface. The chat widget handles common requests without routing to an agent.
Configurable portal widgets	Admins can configure widget behavior, appearance, and content using instance	Portals are built from configurable portal widgets. Admins configure each widget

### Self-service portal capabilities (continued)

Capability	What it provides	How the default portal supports it
	options, without custom widget development.	using instance options, which reduces setup time.
Extend with additional capabilities (using plugins)	Installing the relevant plugins adds the corresponding pages and widgets to the portal.	Portal list pages and record view pages display the experiences enabled by each installed plugin.

### Self-service portal benefits

Self-service portals provide benefits to internal and external users across an organization.

- **For administrators and implementation partners:** The default portals provide a ready-made experience tailored to your B2B or B2C use case, giving your team a head start rather than building from scratch. You can get to market faster, and because portal pages are built with configurable widgets, making changes and maintaining them over time, is significantly easier. Built-in capabilities for case tracking, knowledge, catalog requests, and Virtual Agent reduce routine contacts from day one, reducing case volume.
- **For customers:** When the portal is correctly configured, customers can find the information they need and resolve routine issues without contacting an agent. Whether they are tracking a case, browsing knowledge, or managing their account, customers get a relevant and consistent experience, making it easier for them to get help quickly and on their own terms.

### Use cases

#### Enterprise software: consolidating multiple customer portals

A global enterprise software company supporting more than 20,000 customers had accumulated over 40 separate customer portals across its product lines. The implementation team consolidated the entire customer-facing support operation onto a single portal, with knowledge bases configured with product entitlements and Virtual Agent handling the most common request types. The outcome was a measurable shift toward self-service resolution, with improvements in first-response time, customer onboarding time, and CSAT scores.

#### Government: citizen self-service for benefit applications

A state government department used ServiceNow CSM to replace a fragmented support model where citizens encountered separate support structures across multiple programs with no online self-service. Citizens can now submit applications, track status at each stage, and access information relevant to their situation from any device. The result was a shift from a program-centric service model to a citizen-centric one, with self-service replacing the majority of in-person and phone interactions for routine inquiries.

### Related topics

[Configure the Customer and Consumer Service Portals](#) 

[Configure Business and Consumer Portal](#) 

### Omnichannel

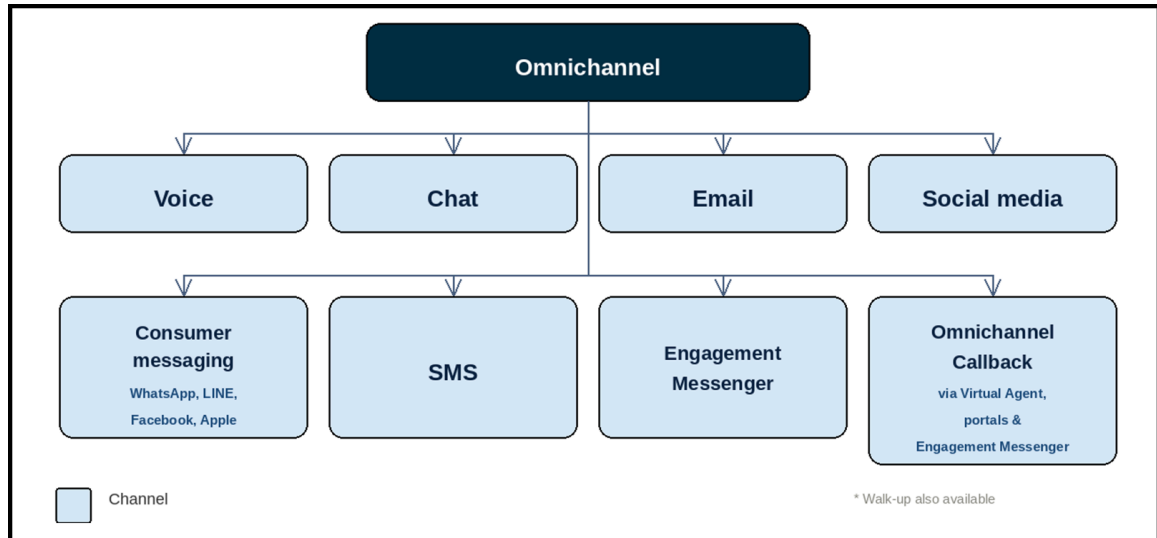
Omnichannel support enables organizations to serve customers across multiple communication channels, including voice, chat, email, SMS, consumer messaging apps, social media, and

Engagement Messenger, from a single, unified workspace. Agents handle all interactions in CSM Configurable Workspace, and customers reach support through whichever channel fits them best.

### Omnichannel overview

Omnichannel integrates customer communications across platforms including email, chat, voice, and messaging applications within a centralized system, ensuring continuity as customers transition between channels. Agents access all interactions with complete context from a single workspace.

CRM omnichannel overview



Advanced Work Assignment (AWA) routes work items across all channels based on agent availability, capacity, and skills. Organizations can configure routing queues independently for each channel, then apply consistent assignment logic across all of them. For example, the same routing system manages chats from the Customer Service Portal, email interactions, WhatsApp messages, and phone calls handled by Contact Center as a Service (CCaaS).

### Available channels

Channel	Description	Key capability
Chat	Live and Virtual agent chat from portals.	AWA routes using pre-chat survey data.
Email	Inbound emails converted to interaction records via Email Interaction (Eaal) or directly to cases via Email to Case.	Agents respond or escalate to a case. Supports outbound email from contact records.
Voice	Customers reach agents via ServiceNow Voice for CSM, CTI, or OpenFrame integration.  Additionally, Interaction Controls Component (ICC) embeds ServiceNow native call controls in the contact center workspaces.	Conversational IVR with Amazon Connect enables Virtual Agent to deflect calls before live agent routing.

**Available channels (continued)**

Channel	Description	Key capability
Omnichannel Callback	Customers request a voice or video callback via Virtual Agent, Portals, or Engagement Messenger.	ASAP or scheduled time options. Agents manage the Callback actions component with CCaaS transfer support.
Consumer messaging	WhatsApp, LINE, Facebook Messenger, and Apple Messages for Business.	Asynchronous Messaging interactions managed in the workspace. Supports outbound conversations.
Engagement Messenger	Self-service interface embedded on third-party websites for knowledge browsing, case creation, and chat.	Supports asynchronous messaging and displays the omnichannel Callback option when agents are unavailable.

**Note:** CCaaS connects third-party contact center platforms such as Genesys with ServiceNow. It is an integration layer, not a standalone channel, that spans Voice (call routing and controls), Email Interaction (transfer and wrap-up codes), and omnichannel Callback (CCaaS-routed callback management).

**Omnichannel benefits**

Omnichannel provides benefits to customers, agents, managers, and administrators.

- **For customers:** Customers reach support through the channel that is most convenient for them, whether that is a phone call, a chat, or a WhatsApp message. Switching channels does not require customers to repeat information: the interaction record captures context that agents can reference regardless of how the conversation began.
- **For agents:** Agents work in a single interface for all interaction types. CSM Configurable Workspace displays the right record page for each channel automatically, so agents do not have to navigate different tools for chat, email, voice, or messaging. Customer 360 surfaces account details, case history, and install base information in the same view.
- **For managers:** All omnichannel interactions are tracked as interaction records, giving managers consistent visibility into volume, resolution, and agent activity across channels. AWA applies the same routing logic across all channels, making it possible to manage agent workloads and SLAs from a single framework.
- **For administrators:** Communication channels are configured independently and can be activated incrementally. AWA service channels, Virtual Agent topics, and workspace record pages are shared across channels where appropriate, reducing the overhead of maintaining separate configurations for each channel.

**Products and contexts**

Each product within the CRM suite uses omnichannel to connect customers with agents through the channels appropriate to its workflows.

**CSM**

Customer Service Management (CSM) is the foundation for omnichannel contact center operations. Agents use CSM Configurable Workspace to handle interactions across chat, email, phone, messaging, Engagement Messenger, callback, and social media channels. Each interaction creates a record that links to cases, surfaces customer context, and follows the AWA routing rules configured for that channel.

Channels can be activated incrementally to match an organization's current service model.

For CCaaS environments, the Interaction Controls Component (ICC) embeds the CCaaS provider's call controls directly in the agent's workspace. CCaaS-routed email and callback interactions appear in the agent's inbox alongside native channel interactions, so agents in a blended contact center work from a single interface regardless of how the interaction was routed.

### **Sales CRM**

Sales CRM uses omnichannel to keep customer conversations connected across the quoting and fulfillment cycle. A buyer can chat live to get a quote, follow up by email when the order is placed, and check delivery status via WhatsApp or Engagement Messenger, all without repeating their details. Each interaction links to the same account, contact, and case record, giving agents full context regardless of which channel the conversation arrives on.

### **FSM**

Field Service Management uses the omnichannel framework to support both dispatchers managing work order queues and customers requesting onsite service. Walk-up Experience and conversational appointment booking enable customers to schedule onsite visits through self-service channels. Omnichannel Callback is available in FSM environments, allowing customers to request a callback rather than wait for an agent. Dispatchers and agents work in the shared Configurable Workspace, configured in UI Builder using the same framework as CSM.

### **Industry solutions**

Telecommunications, financial services, and manufacturing solutions include preconfigured omnichannel channel configurations, and workspace record pages tailored to the workflows common in those industries. Organizations deploy these preconfigured experiences as a starting point and extend channel configurations, AWA routing rules, and Virtual Agent topics in UI Builder as their requirements evolve.

## **Use cases**

### **Retail banking: blended inbound and messaging support**

A retail bank deploys chat and email as its primary inbound channels for retail customers and adds WhatsApp as a messaging channel for customers who prefer not to use the bank's portal. Inbound chat and email interactions are routed by AWA to agents based on the case type indicated in the pre-chat survey or email subject. WhatsApp conversations follow the same routing logic. Agents handle all three channel types from CSM Configurable Workspace, using the interaction record page configured for each channel. Agents needing to follow up with a customer can initiate an outbound WhatsApp message or email directly from the contact record.

### **Telecommunications: website self-service with callback fallback**

A telecom provider embeds Engagement Messenger on its customer support website. Customers can search knowledge articles, check order status through the service catalog, and start a chat with Virtual Agent without leaving the page. When wait times exceed a threshold, Engagement Messenger presents the omnichannel Callback option. Customers who request a callback are added to the callback queue, and agents call them back from CSM Configurable Workspace when an agent becomes available. Scheduled callbacks let customers pick a specific time, reducing abandonment during peak periods.

### **Manufacturing: walk-up and field service**

A manufacturer deploys Walk-up Experience for Customer Service at its service centers to manage customer check-ins for hardware repair. Customers check in at the walk-up kiosk, and agents manage the queue from CSM Configurable Workspace. When a repair requires on-site service, agents create a work order in Field Service Management from the case record. Field technicians see the work order in the FSM workspace, and customers receive updates through the email channel.

## Related topics

[Enable communication channels](#) 

## Web embeddables

Web embeddables are a set of self-service components that you can embed directly into external websites to give customers access to ServiceNow self-service capabilities without leaving your site. Customers can search for knowledge articles, submit requests, and create and track cases from any web page where the components are deployed.

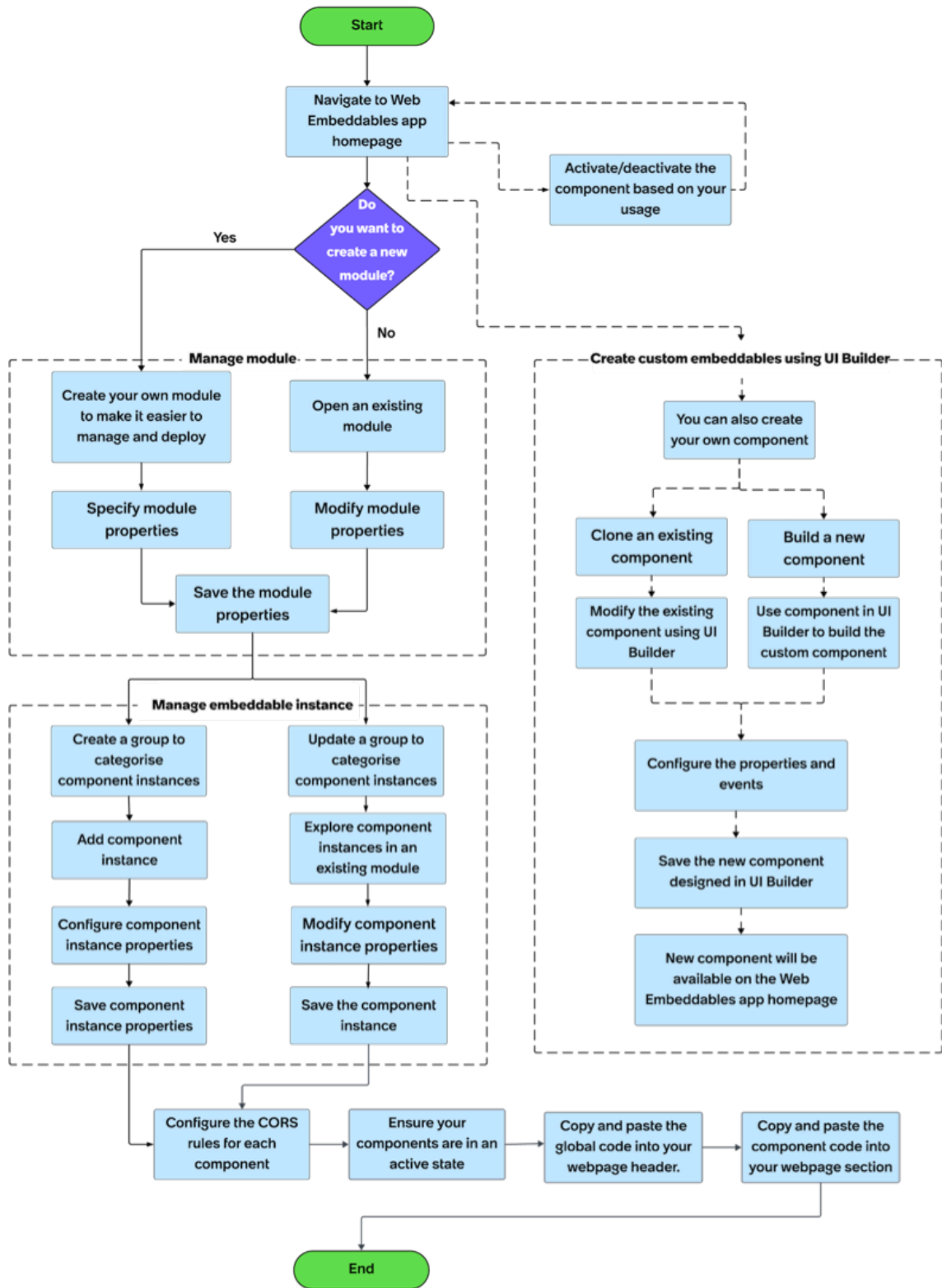
### Web embeddables overview

Web embeddables offer pre-built, configurable components that organizations embed directly into external websites to give customer access to ServiceNow self-service capabilities without leaving the site or being redirected to a separate portal.

Administrators manage web embeddables through a dedicated experience in the ServiceNow instance. Each external website is represented as a module. Within a module, administrators add components and configure each component instance to control its behavior, appearance, and data access. The same component type can be configured differently across multiple external sites, all managed from a single ServiceNow instance.

Web embeddables include default components that address common self-service use cases, including knowledge search, case creation and tracking, and service catalog browsing. Organizations that need capabilities beyond the default components can create custom components. Custom components follow the same deployment model as default components and are managed within the same admin experience, allowing organizations to extend web embeddables without maintaining a separate integration layer.

## High level end-to-end workflow of web embeddables



## Web embeddables benefits

Web embeddables provide benefits to customers and administrators across an organization

- **For customers and end users:** Web embeddables enable users to access ServiceNow self-service capabilities from within the organization's main website using their existing authentication. Customers can search for knowledge articles, submit service requests, create cases, and track case progress without leaving the site or signing in to a separate portal.

- **For administrators:** Web embeddables reduce the effort required to create and maintain the components needed to extend ServiceNow self-service capabilities to external websites. The default components are configurable, themeable, and Non-functional requirements (NFR) compliant.

## Web embeddables components

Web embeddables include nine components that cover knowledge, catalog, case management, and data presentation use cases.

### Knowledge Article View

Displays a specific knowledge article inline on an external page. Organizations use this component to surface resolution content, product documentation, or policy information at the point where customers are most likely to need it. The component renders article content from the ServiceNow knowledge base and supports article feedback.

### Catalog Browse

Shows service catalog categories and items on an external page, allowing customers to explore available services and navigate to specific items. Organizations use this component to expose a curated service catalog on intranets, employee portals, or customer-facing sites without requiring access to the ServiceNow portal.

### Catalog Item/Service Request

It surfaces with a specific catalog item form on an external page, allowing customers to submit a service request directly from the site. Organizations use this component to make high-demand services available at the point of need, such as embedding a hardware request form on an IT intranet page or a returns request form on a product support page.

### Case Create

Provides a case submission form on an external page. Customers complete the form and submit a case to ServiceNow without leaving the site. Organizations use this component on support pages and contact pages to capture structured case data and route it directly into ServiceNow case management workflows.

### Case View

Shows the details of a specific case on an external page. Customers can review case status, activity, and resolution information from the external site where the component is embedded. Organizations use this component to give customers visibility into their cases without requiring access to a full self-service portal.

### Case List

Displays a list of cases associated with the authenticated user on an external page. Customers can review open and resolved cases and navigate to individual case details. Organizations use this component on account pages and support dashboards to give customers a consolidated view of their service history.

### Object List

Displays a configurable list of ServiceNow records on an external page. The component supports a range of record types and can be configured to display fields, filters, and actions relevant to the use case. Organizations use this component to surface data that does not fit a standard case or catalog pattern, such as order records, incident queues, or asset inventories.

### Data Visualization

Renders charts and data summaries from ServiceNow on an external page. Organizations use this component to surface operational metrics, service performance data, or analytics relevant to the audience of the external site, such as SLA summaries on a customer account page or request volume trends on an operations dashboard.

### Playbook Intake

Enables you to submit a case using the playbook guided experience, which systematically captures case details and displays the stages and activities involved in resolving the case. You can use prefilled fields or choose from various playbook experiences, and customize the display of stages, such as the number of visible stages and their horizontal or vertical orientation.

## Use cases

### Technology: product support site

A software company embeds Knowledge Search and Case Create on its product support site. Customers searching for help see relevant knowledge articles inline before deciding whether to submit a case. Customers who do not find a resolution complete the Case Create form without leaving the support site.

After submitting a case, the customer accesses Case View on their account page to monitor status and review agent responses. The company reduces inbound case volume from customers who resolve issues through knowledge search and provides a consistent support experience without building a separate portal.

### Financial services: customer account portal

A financial services organization embeds Catalog Item on its customer account portal to allow customers to submit account service requests, such as address changes and statement requests, directly from the portal page. Case List gives customers a view of all open and resolved cases from the same page.

Because the components connect to the existing ServiceNow instance, submitted requests enter the same fulfillment workflows as requests submitted through other channels. The organization extends self-service to the account portal without duplicating workflow configuration or case management infrastructure.

### Telecommunications: device and plan support

A telecommunications provider embeds Knowledge Search and Case Create on device-specific support pages. Customers troubleshooting a device see knowledge articles relevant to that device model before submitting a support case. The Case Create component is pre-configured with the device context, so customers do not need to reenter information already captured by the page.

The provider also embeds Data Visualization on an internal operations dashboard to surface case volume and SLA performance metrics for service managers reviewing daily operations.

### Manufacturing: dealer and partner portal

A manufacturer embeds Catalog Browse and Catalog Item on a dealer portal to give authorized partners access to parts ordering, warranty claim submission, and service documentation requests. Partners complete catalog requests from the portal without requiring access to the full ServiceNow instance.

Object List surfaces open order records on the portal so dealers can monitor fulfillment status for submitted requests without contacting the manufacturer directly.




**Related topics**

[Configure Web Embeddables](#)




**CRM products**

Use the ServiceNow CRM products to manage customer interactions, service requests, field operations, and order fulfillment across the full customer lifecycle. Whether you are starting or expanding a CRM implementation, learn more about the available products, features, and workflows that can help your organization deliver consistent, connected customer experiences.

**CRM products**

<p><b>Customer Service Management</b></p>  <p>Manage customer cases, resolve problems, and track interactions across multiple channels.</p> <p><a href="#">Learn more</a></p>	<p><b>Field Service Management</b></p>  <p>Manage work orders, assets, or locations, and dispatch agents to perform field work.</p> <p><a href="#">Learn more</a></p>	<p><b>Sales CRM</b></p>  <p>Manage your sales cycle, including lead and opportunity management, quote generation, order management, contract renewals, and invoicing.</p> <p><a href="#">Learn more</a></p>
--	--	--

**Industry products**

<p><b>Financial Services</b></p>  <p>Help financial institutions deliver convenient experiences that build customer loyalty.</p> <p><a href="#">Learn more</a></p>	<p><b>Healthcare and Life Sciences</b></p>  <p>Move information and work across healthcare organizations so providers, payers, and life science companies can provide excellent patient care.</p> <p><a href="#">Learn more</a></p>	<p><b>Manufacturing Commercial Operations</b></p>  <p>Integrate people, process, and technology into a system of action across the manufacturing value chain.</p> <p><a href="#">Learn more</a></p>
---	--	--

**Public Sector**



Enable the development of public sector applications for the delivery of digital services to constituents, such as benefits, licenses, and service requests.



**Retail**



Enhance the efficiency of retail operations through optimized processes and tools.



**Telecommunications,  
Media, and Technology**



Unite ordering and assurance on one platform for a seamless experience and visibility for communications service providers.

