Australia Telecommunications, Media, and Technology

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Telecommunications, Media, and Technology (TMT)

The ServiceNow® Telecommunications, Media, and Technology (TMT) unifies customer care, order management, network operations, and partner ecosystems on one AI-powered platform to modernize service provider operations.

Built for service providers and technology companies, it enables businesses to scale and capitalize on the fast-growing "everything-as-a-service" opportunity by streamlining complex processes, automating workflows, and improving service delivery across customer, network, and partner interactions.

TMT brings together legacy systems, streamlines service fulfillment workflows through automation, enables real-time management of network inventory, and coordinates complex processes involving customers, the network, and partners.

Key benefits

- Reduce operational costs through process automation and system consolidation.
- Accelerate time-to-market with default workflows for service activation and order management.
- Improve customer experience with real-time visibility, intelligent alerting, and proactive issue resolution across the entire customer life cycle.
- Improve agent efficiency with real-time visibility across systems that enables first-contact resolution and reduces escalations.

Solutions and benefits

Solutions	Overview	Applications
Telecom Service Management (TSM)	Telecommunications Service Management (TSM) breaks down siloed legacy systems with a unified AI platform that connects service and network operations. Built with industry standards and AI capabilities, TSM enables faster adoption, reduces operational costs, and enhances customer loyalty for telecommunications providers.	• Now Assist for Telecommunications, Media, and Technology • Customer Success Management • Service Exchange • Product Support for Technology • Customer Service Problem Management • Service Test Management • Telecommunications Customer 360
Additional capabilities	Telecommunications applications that enable you to automate operations and manage your infrastructure include network inventory, service operations, portfolio planning, field work, ad order management.	• Telecommunications Network Inventory • Telecommunications Service Operations Management • Sales Customer Relationship Management for Telecommunications • Field Service Management for Telecommunications • Strategic Portfolio Management for Telecommunications

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Solutions and benefits (continued)

Solutions	Overview	Applications
Technology Provider Service Management (TPSM)	Technology Provider Service Management (TPSM) automates work for technology providers to reduce contact center volumes, boost agent productivity, and maximize customer lifetime value. By embedding continuous AI innovation across customer-facing and internal workflows, TPSM enables as-a-service business models that accelerate value, fuel growth, and reduce costs.	• Now Assist for Telecommunications, Media, and Technology • Customer Success Management • Service Exchange • Product Support for Technology
Additional capabilities	Sales CRM for Technology Providers unifies sales, order management, and post-sales services on a single platform. Define new services quickly through catalog-driven orchestration, capture orders accurately, and automate fulfillment to reduce costs and improve customer retention.	Sales CRM for Technology Providers

Developer reference

TMF APIs for TMT	Open Digital Architecture-aligned REST APIs available across TMT solutions — a shared API surface for integrations.	Browse APIs by product

Additional resources

- Learn more about what's new and changed, see the Telecommunications, Media, and Technology release notes.
- Learn about Customer Service Management at Customer Service Management
- Log in to your ServiceNow® account and find additional information about implementing and deploying Telecommunications, Media, and Technology (TMT) 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 general guidelines at the Customer Success Center.
- Connect with other Telecommunications, Media, and Technology (TMT) users at Now Community.

Telecommunications Service Management (TSM)

Telecommunications Service Management (TSM) unites customer service and network operations on a single AI-powered platform, enabling communication service providers to resolve issues faster, reduce costs, and improve customer satisfaction.

Service and network operations leaders face challenges from organizational silos that create disconnects between teams and customers. Front line agents handle high volumes of customer requests while back-office teams lack essential information to resolve problems efficiently. This results in slow service, missed SLAs, and strained customer relationships.

TSM addresses these challenges by breaking down siloed legacy systems with a unified AI platform that brings together service and network operations. Built-in industry standards, AI capabilities, and integrations enable faster adoption and reduced operational costs.

TSM benefits

- Empower customer self-service.
  - Resolve issues independently through AI-powered virtual agents on preferred channels.
  - Check service status, make requests, change appointments, and find solutions without agent contact.
  - Receive real-time updates and proactive notifications during disruptions to reduce support calls and escalations.
- Supercharge agent productivity.
  - Access unified customer and network context with AI-powered case summaries, diagnostics, and suggested solutions.
  - Use Now Assist for faster problem diagnosis, case closure, and knowledge article creation.
  - Work in configurable workspaces with comprehensive customer views and visual task guides.
  - Automate routine tasks so human agents can focus on complex problems.
- Deliver seamless ecosystem experiences.
  - Serve customers across channels with smart self-service and proactive issue resolution.
  - Enable rapid onboarding of customers and partners for faster value realization.
  - Connect the full value chain for unified service and resolution.
  - Track products and services, notify customers about issues proactively.
  - Accelerate ROI with prebuilt blueprints to boost engagement and adoption.

TSM capabilities

TSM combines purpose-built applications with CSM and core platform capabilities to address common challenges.

Application	Value
Now Assist for Telecommunications, Media and Technology (TMT)	Use AI-powered industry workflows to supercharge insights, actions, and self-service experiences.
Customer Service Problem Management	Efficiently identify and resolve service problems with a streamlined service management process.
Customer Success Management	Drive adoption, mitigate risk, and maximize customer value with proactive success strategies, real-time health monitoring, and intelligent automation.

Application	Value
Service Exchange	Quickly connect enterprise customers and suppliers running ServiceNow® to optimize work across the value chain.
Product Support for Technology	Proactively notify customers of service disruptions and provide real-time resolution tracking.
Service Test Management	Unite customer service and network operations on a single platform.
Telecommunications Customer 360	Aggregate data from multiple systems into a single platform.

Additional resources

- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Connect with other TSM users at Now Community.

Related topics

Telecommunications, Media, and Technology (TMT)

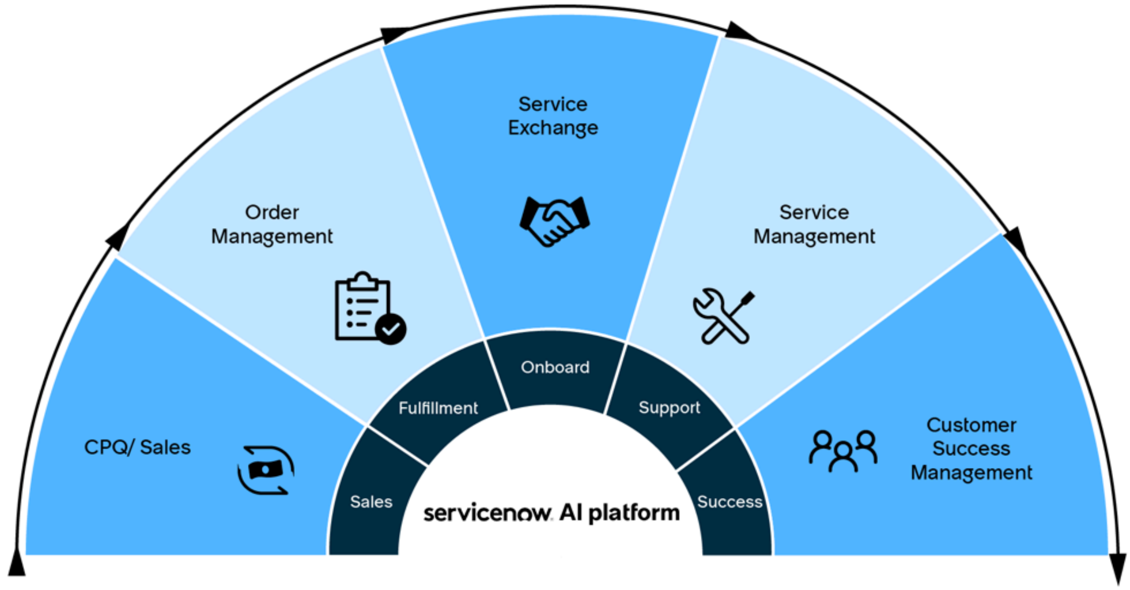
Technology Provider Service Management (TPSM)

Technology Provider Service Management (TPSM) intelligently automates work to reduce contact center volumes, supercharge agent productivity, and maximize customer lifetime value. TPSM embeds continuous AI innovation into workflows, making it easy for technology providers to extend AI to as-a-service business models while accelerating value and reducing costs.

Technology providers often operate with fragmented, legacy architectures and siloed data across front, middle, and back offices. This complexity creates significant barriers to transforming critical processes such as onboarding, service, delivery, support, and customer success. Some of the key challenges are:

- Onboarding remains manual and time-intensive, slowing time-to-value.
- Customer support is constrained by limited resources, leaving customers waiting for answers to basic queries.
- Visibility into technology ROI is minimal, making it difficult to demonstrate value.
- Agents spend excessive time on repetitive case management, resulting in slower resolutions and inconsistent updates.

These inefficiencies reduce operational performance, increase customer dissatisfaction, and raise churn risk. Addressing these challenges requires an integrated, modern architecture that enables automation, real-time insights, and seamless customer engagement.



TPSM benefits

Streamlining experiences for customers and internal teams helps technology providers reduce contact center volumes, supercharge agent productivity, and maximize customer lifetime value. TPSM automates work for technology providers to:

- Reduce contact center volumes
- Boost agent productivity
- Maximize customer lifetime value

TPSM capabilities

TPSM combines purpose-built applications for technology providers with Customer Service Management and platform core to address common challenges. TPSM begins with the ServiceNow AI Platform, Customer Service Management, and IT Service Management product capabilities. It then builds on additional value-added features purpose-built for technology providers. Those features include the following:

Application	Value
Now Assist for Telecommunications, Media and Technology (TMT)	Use AI-powered industry workflows to supercharge insights, actions, and self-service experiences.
Customer Success Management	Drive adoption, mitigate risk, and maximize customer value with proactive success strategies, real-time health monitoring, and intelligent automation.
Service Exchange	Quickly connect enterprise customers and suppliers running ServiceNow® to optimize work across the value chain.
Product Support for Technology	Proactively notify customers of service disruptions and provide real-time resolution tracking.

Additional resources

- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Connect with other TPSM users at Now Community.

Related topics

Telecommunications, Media, and Technology (TMT)

Customer Service Problem Management

Efficiently identify and resolve service problems experienced by the customers with the ServiceNow® Customer Service Problem Management (CSPM) application. Technology, media, and telecommunications (TMT) service providers can streamline their service management processes and ensure a seamless experience for their customers by leveraging this application.

Get started

Explore Learn about how service providers use CSPM	Configure Plan and configure your implementation.
Use Use CSPM as an agent to diagnose and resolve service problems.	Reference Get details about domain separation and components installed with CSPM.

Additional resources

- Learn more about what's new and changed, see the Customer Service Problem Management release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Service Problem Management 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 Problem Management users at Now Community.

Exploring Customer Service Problem Management

Learn how you, as a service provider, can use the Customer Service Problem Management (CSPM) application to streamline the resolution process for handling service-related problems experienced by your customers.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Customer Service Problem Management (CSPM) offers a step-by-step process to address customer issues. The process starts with verifying the customer's problem as defined in the service problem case. The system then automatically suggests relevant diagnostic tests to check the service quality and troubleshoot the problem effectively. After identifying the root cause, the application helps generate a repair task based on the test outcomes, leading to a successful resolution. This streamlined process simplifies problem solving for customer service agents, enabling faster resolution and improved efficiency, which in turn enhances customer satisfaction.

If customers experience an issue with their internet service, they can report it to create a case for resolution. The case is then routed to the CSPM application, which analyzes the issue and suggests the relevant diagnostic tests to identify the root cause of the problem. The system then assigns the case to an agent who runs these tests and examines the results. Based on the findings, the agent takes necessary actions to fix the problem and restore the internet service for the customer.

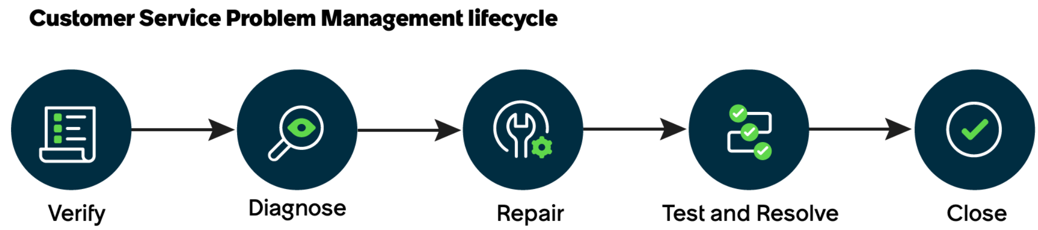
Customer Service Problem Management data model

Customer Service Problem Management (CSPM) provides a framework that enables you to follow a structured approach to handle and resolve customer-reported issues. The framework ensures a seamless and satisfactory customer experience.

CSPM follows the TeleManagement Forum (TMF) defined framework to manage service problems. These problems arise when customers experience service disruptions, or when the network operations center (NOC) team identifies network faults and raise complaints, such as service disruptions, errors, or other issues. The CSPM application focuses on the test diagnostic capability to resolve service problems. This includes conducting relevant tests to diagnose the root cause of the problem and then suggesting resolutions based on the test results.

Customer Service Problem Management data model life cycle

CSPM enables a service-related problem to move through the various stages of Service Problem Management's life cycle to get resolved.

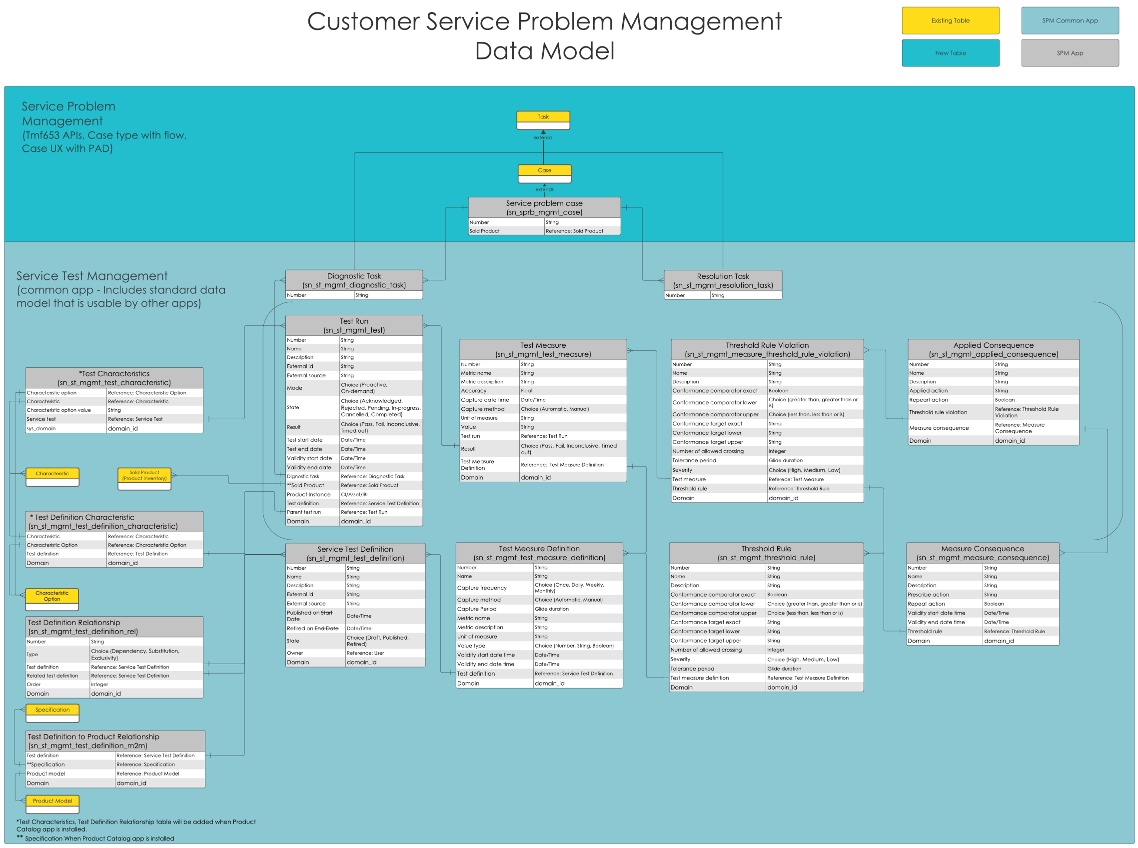


Life cycle of the CSPM data model

Stage	Description
Verify	Verify the case created for a service problem experienced by the customer. This includes reviewing the details provided in the case. If necessary, the agent can also modify the service based on the problem. Based on these details, the system suggests the diagnostic tests.
Diagnose	System-derived test specifications, defined during the initial setup. These specifications are crucial for diagnosing the root cause of service problems. Agents can run these tests immediately or schedule them for a later time. Additionally, the system enables agents to view and run these tests.
Repair	Based on the diagnostic test results, the system generates the repair tasks to fix the problem.
Test and Resolve	Service problem fulfillment coordination that follows the fulfillment flow.
Close	Final step in the Service Problem Management life cycle.

Customer Service Problem Management data model

The following diagram shows the applications, tables, and their relationships that build the CSPM data



model.

The CSPM data model uses a combination of these tables to store data:

- Tables that are from the Service Test Management application includes the following tables:
  - Test Definition
  - Test Measure Definition
  - Test Definition Characteristics
  - Test Definition Relationship
  - Specification to Test Definition Relationship
  - Threshold Rule
  - Measure Consequences
  - Diagnostic Task
  - Resolution Task
- Table that is from the Customer Service Problem Management application includes, service problem case.

The Customer Service Problem Management (CSPM) data model relies on Northbound and Southbound APIs to manage and execute test processes.

Northbound APIs play a critical role during the design phase by creating and managing essential components like test definitions, characteristics, measures, and thresholds. These APIs enable the CSPM system to define the specifications and parameters for each test, such as the test type and scope, which are then used to generate unique test runs with identifiers, such as external IDs or sys_id. After these test definitions are established, Northbound APIs facilitate the creation of test runs based on these predefined specifications. If a test requires further breakdown into smaller tasks, the Northbound APIs handle this decomposition. For more information, see Service Test Management Open API.

Southbound APIs come into the picture when it's time to execute the tests. For example, if the test involves running a speed test, it isn't conducted directly on your system but instead on an external device, such as a router or another network component. The Southbound APIs are responsible for sending these test instructions to the external systems where the tests are to be performed. For more information, see Integrating Customer Service Problem Management with southbound external systems.

Overall, Northbound APIs are used to design and set up the tests within the CSPM application, while Southbound APIs handle the execution of these tests on external systems. This two-tiered approach promotes a seamless flow from test definition to execution across different platforms.

Alternative dispute resolution management

Use the Alternative Dispute Resolution (ADR) case to resolve customer disputes efficiently while confirming transparency, accountability, and regulatory conformance.

ADR overview

ADR is a specialized complaint management system within ServiceNow, Inc.'s CSM/FSM workspace. An ADR in the context of customer complaints is a formal process used to address and resolve disagreements between a customer and an organization. ADR extends the complaint case functionality to handle dispute resolution processes. The ADR case provides an end-to-end workflow that includes the necessary steps to resolve a customer complaint.

ADR workflow

The ADR workflow begins when a customer raises a complaint regarding a product, service, billing issue, or contractual matter. As an ADR manager records the escalated complaint, captures requester details, the reviews the related complaint cases, and gathers relevant evidence. Then, communicate with the customer to understand the issue clearly and propose a solution. The objective is to investigate fairly, provide a justified response, and reach a mutually acceptable solution. If the customer accepts the resolution plan, the ADR manager creates the case tasks and resolves the customer issue. If the customer rejects the resolution plan and chooses to escalate the issue externally, the ADR manager issues and shares a deadlock letter with the customer.

Key components of ADR workflow

Component	Description
ADR case type	Captures all necessary details, including the ADR category, customer information, and previous interaction history. Also includes partner contact information for disputes involving third parties.
Fact capture	Captures all facts, investigation details, findings, and proposed resolutions, such as credit notes or bill corrections.
Service Level Agreements (SLAs)	Defined and adhered to based on the severity of the ADR, confirming issues are addressed within specified timeframes to maintain customer trust and satisfaction.

Key components of ADR workflow (continued)

Component	Description
Audit trail	Maintains a comprehensive record of all interactions and root cause analysis (RCA) details, including evidence, for reporting and compliance purposes.
Deadlock letter	Created in cases where a deadlock is reached, capturing the history and RCA of the ADR and informing the customer of the deadlock situation and dispute details.

ADR stages and activities

The ADR case record uses the Case Playbook for Complaints feature to capture the details and execute the workflow. To learn more about the Case Playbook for Complaints, see Case Playbook for Complaints. The following table lists the stages and activities that agents can use to resolve customer issues in the ADR case record.

Case Playbook for Complaints stages and activities

Stage	Activity	Activity Details
Intake Guides the agent to collect the needed to create the ADR case.	Capture initiator details	Captures the details of the requester such as contact information, communication channel, and involved parties.
	Capture ADR information	Captures the details of the complaint such as product or service details, complaint date, complaint description, and any other additional information relevant to the complaint.
	Upload documents	Captures any evidence related to the complaint.
	Notify customer	Displays the details of the email that was automatically sent to the customer at the completion of the Intake stage.
Investigate Enables the agent to do the initial troubleshooting on the case.	Lookup record history	Captures the complaint case records related to the customer complaint.
	Analyze linked fats	Analyzes the linked records details to understand the complaint details.
Resolution Manages the activities for case resolution.	Propose resolution plan	Proposes a resolution for the complaint and sends the details to the customer.
	Resolution feedback	Captures the feedback from the customer after sending the resolution plan to the customer.

Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
	Generate deadlock letter	If customer rejects the resolution plan, this activity enables you to create a deadlock letter and share with the customer. Customer may escalate the issue with an external authority.
Outcome Enables the agent to create the case tasks and send to different back-office teams for resolution.	implement resolution	If customer accepts the resolution plan, this activity enables you to create a deadlock letter and share with the customer.
Closure Close the activities for closing the case.	Close ADR	When the customer accepts the resolution, the Outcome stage completes and the Close stage is also marked as complete. When the customer rejects the resolution, the deadlock letter is created, and the Close stage is also marked as complete.

Using ADR case

To learn more about how to use ADR case, see Using alternative dispute resolution case.

Related topics

Customer service case types

Configuring Customer Service Problem Management

With Customer Service Problem Management (CSPM) define the tests to diagnose the service problems. Implement targeted solutions based on test results to resolve those problems.

The configuration of CSPM requires setting up the following applications to manage service problems from detection through resolution:

Customer Service Problem Management

Streamlines how service-related issues are handled. It enables customer service agents to either initiate a case or access the existing ones that are created in response to the issues experienced by customers. This application serves as a central hub for tracking, managing, and resolving customer issues.

Service Test Management

Enables you to define and manage various tests that help diagnose service problems. By using this application, service teams can confirm that they have robust testing procedures in place, which are critical for identifying the root causes of issues and implementing timely solutions.

As an administrator, follow these steps to configure the Customer Service Problem Management:

- Activate the Customer Service Problem Management application.
- Define Test groups. For more information, see Setting up a test group.
- Define Test definitions. For more information, see Setting up test definitions.

Activate Customer Service Problem Management

Activate the Customer Service Problem Management plugin (sn_sprb_mgmt) for Customer Service Problem Management if you have the admin role. The application includes demo data and activate related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

- Role required: admin
- Plugins required: The following plugins must have been installed:
  - Service Test Management (sn_st_mgmt)
  - Customer Service (com.sn_customerservice)
  - Customer Service Case Types (com.snc.csm_case_types)
  - Playbook Experience Core (com.glide.playbook_experience.config)
  - ServiceNow Integration Hub Starter Pack Installer (com.glide.hub.integrations)
  - playbook for Customer Service Problem Management (sn_csm_playbook)
  - Application spoke selector (sn_appss)
  - Telecommunications, Media, and Technology Core (sn_tmt_core)
  - Product Inventory Advanced (sn_prd_invt)
  - Telecommunication Open APIs (com.sn_tmf_api)

About this task

The following items are installed with Customer Service Problem Management:

- Roles
- Tables
- Properties

For more information, see Components installed with Customer Service Problem Management and Customer Service Problem Management properties.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Service Problem Management application (sn_sprb_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   All dependent plugins and applications that are included, or must be installed are listed in the dialog box.

4. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   > **Important:** If you don't load the demo data during installation, it's unavailable to load later.

5. Select **Install**.

Integrating Customer Service Problem Management with southbound external systems

If you have a Customer Service Problem Management subscription, you can submit outbound service test run requests to various external systems by integrating the Customer Service Problem Management application with the external southbound systems.

Overview of southbound test

When the tests are executed, requests are sent to the southbound test and diagnostics systems. These systems then determine the test outcomes and identify any failures.

Using this integration, a Communications Service Provider (CSP) can do the following tasks:

- Trigger outbound requests for one or more service test runs by using the TeleManagement Forum (TMF) 653 Open POST order API.
- Share updates with the external systems about the inflight changes to the existing test runs that have outbound requests.
- Manage the inbound response of the outbound requests for the test run.
- Manage the errors and exceptions for the outbound requests and inbound responses.

How the integration works

The integration process for CSPM with the external service test management systems is as follows:

1. As the administrator, you activate the Test Specification Open API to capture the test runs from the service problem case.

   To learn more, see Service Test Management Open API.

2. The integration now begins:

   a. The test manager creates the test run in the test run table.

   b. The generated payload is sent to the endpoint of the external fulfillment system.

For more information on configuring external system endpoints by creating an integration request, see Workflow Studio flow integrations.

Note:

- If the test run is configured as hierarchical in the decision table, the system sends all the child service test runs in the hierarchy to the external system that is configured in the application spoke selector.
- If the test run is configured as non-hierarchical in the decision table, the systems send only the individual test run to the external system that is configured in the application spoke selector.

To learn more about spokes, see Building spokes using Spoke Generator.

3. If the fulfillment request is successful, a response is received from the external system and is captured in the Test Run table (sn_st_mgmt_test).

   Note: The customer must fill the id field of the test measures.

Using Customer Service Problem Management

By using Customer Service Problem Management, you can help diagnose and resolve the service problem cases identified in customer complaints.

Customer Service agents can use the CSM/FSM Configurable Workspace or Customer Service Portal to create and resolve a service problem case. The case is a single source of truth to track and have visibility into the customer raised issues. The configurable workspace provides a multi-stage process to get started with the case.

Create a service problem case from the workspace

Create a service problem case for a customer raised issue so that an agent can work on it and resolve the service-related problem.

Before you begin

Role required: sn_sprb_mgmt.agent

Procedure

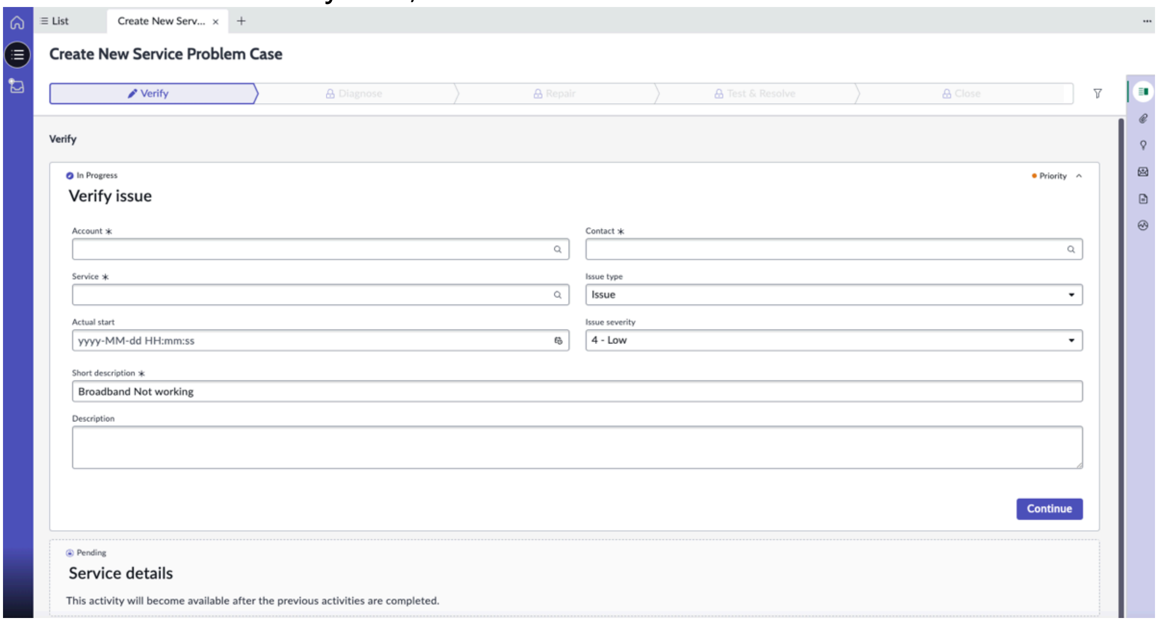
1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Service Problem Case** > **All**.
4. Select **New**.
5. On the service definition page, select the **Telecom Services Support** from the list.
6. Select the applicable service definitions from the list.

   Note: The fibre broadband service definition as been shipped as a part of the demo data.

   For more information about service definition, see Service definitions.
7. Select **Create case**.

In service definition, when you select **Create case** a playbook record generator form appears. Fill the playbook record generator form. For more information about the playbook record generator, see Set up a record generator for case type.

8. On the intake form of verify issue, fill in the fields.



Service Problem Case

Field	Description
Account	The name of the company associated with this case. If you select a contact in the Contact field, this field is auto-filled if the account information is available in the contact record.
Contact	Name of the customer contact for this case.
Service	Name of the affected service for this case.
Short description	Description of the customer issue or problem.
Actual start	Actual start date of the issue.
Issue type	Types of issues ◦ Question ◦ Issue ◦ Feature
Issue severity	Imported severity on the issue. Values 1–4.
Description	Brief description of the customer issue or problem.

9. Select **Continue**.

Create a service problem case in the Customer Service Portal

Customers can create a service problem case to report an issue about the service from the Customer Service Portal.

Before you begin

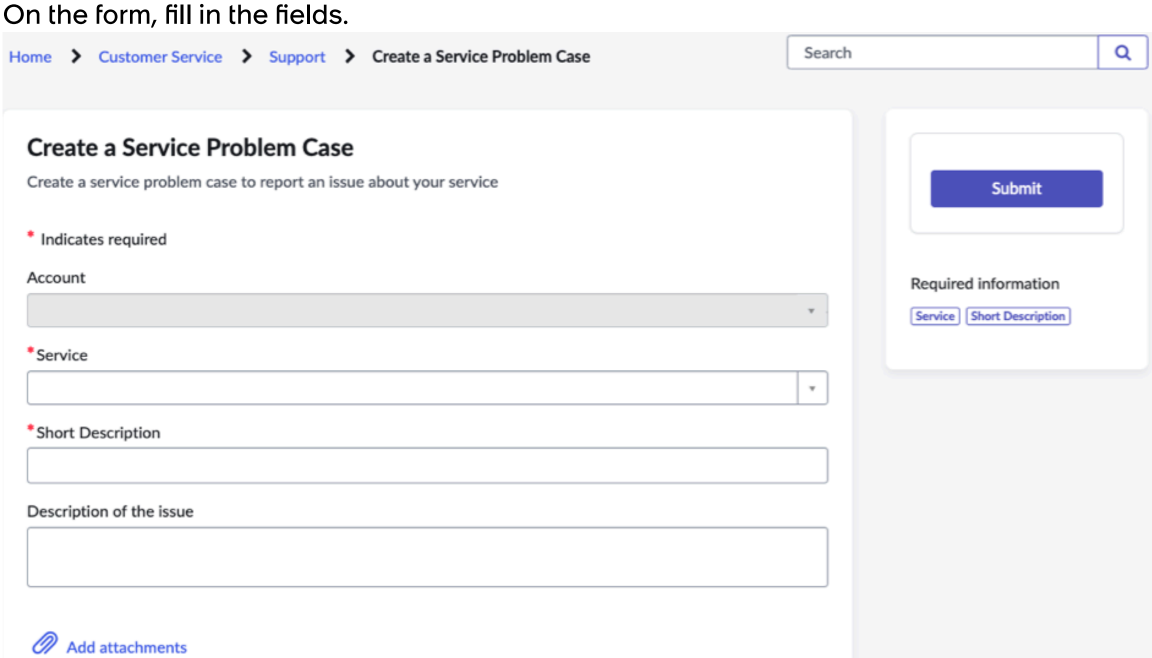
Role required: sn_sprb_mgmt.customer

Procedure

1. Go to the Customer Service Portal by accessing your instance URL and adding a /csm suffix.
2. On the home page, select **Get help**.
3. In the **Categories**, select a **Support** category from the list.
4. Select **Create a Service Problem Case**.

   Case form as been created using record producer. For more information about how to create record producer, see Record Producer.

5. On the form, fill in the fields.



Service Problem Case

Field	Description
Account	This account will be default to logged in user account
Short description	Description of the issue or problem.
Service	Services related to the logged in user account.
Description of the issue	Brief description of the issue.

6. Select **Submit**.
   When the service problem case is submitted, the stage is automatically set to **Verify** and state as **New**.

Diagnose and resolve a service problem case

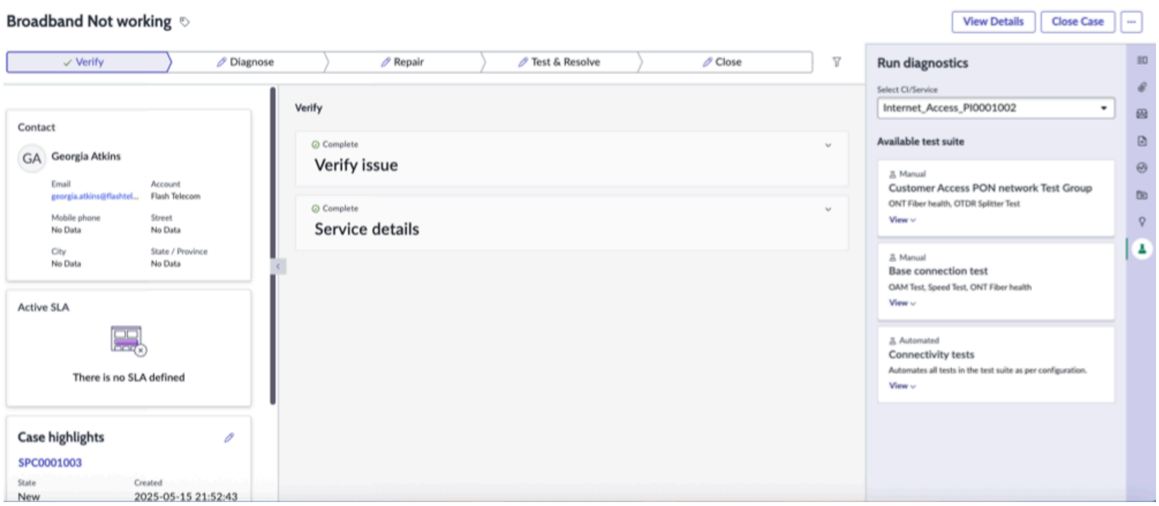
As a customer service agent, review, diagnose, resolve, and close a service problem case for the service-related issue experienced by the customer.

Before you begin

Role required: admin

About this task

The service problem case progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis stage, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair stage, creating a task to fix the identified issue. The agent follows the instructions in the repair task to address the problem areas. Once the repair is complete, the service is retested to confirm that the issue is resolved. Finally, the case is resolved and closed based on the customer's feedback on the provided solution.



Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Service Problem Case** > **Assigned to me**.
4. Open a service problem case that is in the New or Open state.
5. Review and verify the service problem case.
   a. In the **Verify** tab, expand **Verify issue**, and then review and verify the general details for the service problem.
   b. Expand **Service details** and review the remaining details of the service.
   c. Select **Continue**.

   Note: Before the state is moved to close, the fields in the service problem case form can be edited from the case highlights card.

   The service problem case moves to the Diagnose stage.
6. Diagnose the service problem case to identify the root-cause of the problem.

   The decision table can be configured to control the visibility of the Run Diagnostics contextual panel tab. For more information about decision tables, see Decision Tables.

a. To generate the test results, select **Run diagnostics** from the contextual panel.

b. In the run diagnostics panel, select **CI/Service** from the drop-down list.

   The drop-down list shows the current product inventory and all the child inventories.

c. Expand the cards in the **Available test suite**.

   To set up the test definitions, see Setting up test definitions.

   To set up a test group, see Setting up a test group.

d. In the manual test, select single/multiple tests.
   In the automated test, selection of test isn't available. The subflow that is configured for the test group would be invoked.

e. Select **Configure**.

f. In the Configure tests dialog box, fill the test required characteristics form to activate the **Run test** button.

g. **Optional:** In the test dialog box, select an option either to run the test now or to schedule it for later.

h. Select **Run test**.

i. Select the **Test results** tab and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

   The failed tests indicate that issues causing the service problem are identified and needing repair.

   The maximum number of rows according to group is limited to 20. To configure the maximum number of rows more than 20 according to group, see Presentational List Usage.

j. **Optional:** If the status of diagnose is new or closed, select the **View Details** icon for a specific test result to review its details.

k. **Optional:** If the status of diagnose is Pending for inputs, select the **View Details** icon and fill the form.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.
   A repair task is created for each unique service and test definition.

m. Select **Continue**.

n. **Optional:** In the **Diagnostic tasks** tab, select **Create** to create manually the diagnostic tasks.

The case moves to the Repair stage.

7. Repair the service problem case by creating a new or automated repair task.

- Select **Generate automated task** to automatically create a repair task.
- Select **Create repair task** to manually create a customize repair task.

A Repair task is created for all failed test cases related to the diagnosed service problem. For each unique service and test specification, only one repair task is created. The agent can then work on it and close this repair task.

Note: Select the refresh icon ( ) to view the repair task in the Repair task list.

a. Select the repair task that you want to work on, such as RT0001101.

b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the service problem.

c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.

d. Select **Save** and close the resolution task.

e. Select **Continue**.

The case moves to the Test and Resolve stage.

8. Review the test status and resolve the service problem case.

a. Expand the Test summary to review the status of the test that you fixed in the Repair stage.

b. Expand Resolve and fill in the fields.

Resolve

Field	Description
Resolution code	How the case is resolved. For example, Fixed by Support/Guidance provided.
Cause	Cause of the service problem case.
Resolution notes	Summarizes the resolution of service problem case.
Add resolution notes to comments	Resolution notes that are available to anyone who can view the case activity stream.

c. Select **Resolve case**.

The Case highlights section is updated with the current state, such as Resolved.

9. To view the case-related list in the playbook contextual side panel, select the **Related items**.

The Case playbook: The horizontal stages page incorporates related list functionality into the contextual side panel. These lists appear in an accordion format that agents can expand and collapse as needed.

For more information about the related items components, see Playbook related items component.

10. Close the service problem case.

a. Go to the Close stage and fill in the fields.

Close case form

Field	Description
Resolution code	Code value that explains how the case is resolved. For example, Fixed by Support/ Guidance provided.
Resolution notes	Summarizes the resolution of service problem case.
Add resolution notes to comments	Option to make the resolution notes available to anyone who can view the case activity stream.
Additional comments (Customer visible)	Comments related to the service problem case, if any. These comments are visible to your customer who can access this case.
Work notes	Information about state transitions.

b. Select **Accept Solution** or **Reject Solution** based on the customer feedback.

Result

The service problem case is resolved and closed successfully.

Using alternative dispute resolution case

Use the Alternative Dispute Resolution (ADR) case to resolve escalated customer disputes efficiently.

Related topics

Alternative dispute resolution management

View an Alternative Dispute Resolution case record

View the details of an Alternative Dispute Resolution (ADR) case record in the CSM/FSM Configurable Workspace so that you can review the complete ADR case information.

Before you begin

Role required: sn_telco_adr_mgmt_manager

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the list icon ( ).
3. Navigate to **Alternative Dispute Resolution** > **All**.
4. Select the ADR case record that you want to see the details.

Related topics

Alternative dispute resolution management

Create an Alternative Dispute Resolution case

Create an Alternative Dispute Resolution (ADR) case record in the CSM/FSm Configurable Workspace so that you can investigate and resolve an escalated complaint.

About this task

At the initial stage, you capture the complaint initiator details and complaint details. Throughout the investigation, all relevant interactions, updates, and findings are captured within the ADR case record. After completion of the review, you propose the resolution with the customer. If the customer accepts the resolution, close the case accordingly. If the customer doesn't accept the resolution, generate and issue a deadlock letter to conclude the internal complaint process formally. The ADR case record details are captured in the ADR Complaint [sn_telco_adr_mgmt_complaint] table.

Before you begin

Role required: sn_telco_adr_mgmt_manager

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the list () icon.
3. Navigate to **Alternative Dispute Resolution** > **All**.
4. Select **New**.
5. On Intake stage, do the following.

   a. On the Capture initiator details form, fill in the fields.

      You can submit the details of the initiator of the complaint in the Capture initiator details form. To learn more about field information, see Capture initiator details form.

   b. Select **Continue**.

   c. On the Capture ADR information form, fill in the fields.

      You can submit the details of your complaint in the Capture ADR information form. To learn more about field information, see Capture ADR information form.

   d. Select **Mark Complete**.

   e. On the Upload documents view, select **Add file** to add any attachments such as any evidence related your issue.

   f. Select **Continue**.
      An email is sent to the customers. You can view the email details on the Notify customer activity view.

6. On Investigate stage, do the following.

   a. On the Lookup record history view, under the Relevant record section, select **Link this record** on the record tile that you want to link with the complaint.
      Relevant records that match with the complaint's short description. It displays the five relevant records. You can also select the search () icon to find more records that are relevant to the complaint.

Note: If you're using the Now Assist for TMT, you can see the requester's sentiments on a case record. To learn more, see Analyze the sentiment of a service problem case using Now Assist for TMT.

The selected records appear under the Current Linked section.

b. **Optional:** To unlink the record, select **Unlink this record**.
The unlinked records don't appear on the Relevant records section again.

c. Select **Continue**.

d. On the Analyze linked facts card, enter your findings in the **Key findings** field.

Note: If you're using the Now Assist for TMT application, you can generate the comprehensive summary of the linked records. To learn more, see Summarize the linked records using Now Assist for Telecommunications, Media and Technology (TMT).

e. Select **Continue**.

7. On the Resolution stage, do the following.

a. On the Propose resolution plan form, fill in the fields.

Propose resolution plan form

Field	Description
Resolution code	Type of proposed resolution to identify the solution.
Add resolution notes to comments	Select this option to add the resolution notes to the ADR case activity stream. Selecting this check box makes the resolution notes available to anyone who can view the ADR activity stream.
Resolution notes	Detailed summary to resolve the complaint. **Note:** If you're using the Now Assist for TMT application, you can generate the resolution notes using the Now Assist component. To learn more, see Generate resolution notes for ADR case.

b. Select **Propose resolution**.
An email with the details of the key findings and resolution notes is sent to the customer.

c. On the Resolution feedback form, add the feedback from the customer in the **Resolution notes** field.

d. Select one of the UI actions based on the customer feedback and do the following.

UI action	Steps
Customer accepted	The Outcome stage appears. i. On the Implement resolution card, select **Create task**. **Note:** You can create multiple case tasks depends on the resolution plan. ii. Execute and close the tasks. The **Continue** button appears. iii. Select **Continue**.
Customer rejected	i. On the Generate deadlock letter card, add the details in the **Customer correspondence content** field. **Note:** If you're using the Now Assist for TMT application, you can generate the deadlock letter details using the Now Assist component. To learn more, see Generate a deadlock letter using Now Assist for TMT. ii. Select **Generate and send**. A deadlock letter is generated in PDF format and sent to the customer via an email.

8. On the Closure stage, Select **Close complete**.

Related topics

Alternative dispute resolution management

Customer Service Problem Management reference

Reference topics provide additional information about Customer Service Problem Management.

Components installed with Customer Service Problem Management

Several types of components are installed with activation of the Customer Service Problem Management application, including tables, user roles, and business rules.

Roles

Customer Service Problem Management adds the following roles:

Roles installed with Customer Service Problem Management

Role	Description
Test Definition Manager [sn_st_mgmt.test_def_manager]	Enables you to set up, create, and update service test definitions and all their related child entities. Additionally, this role includes the ability to view the product catalog.
Test Definition Viewer [sn_st_mgmt.test_def_viewer]	Enables you to read the service test definition and all its related child entities.
Test Definition Writer [sn_st_mgmt.test_def_writer]	Enables you to write the service test definition and all its related child entities. Additionally, this role includes the test definition viewer role.
Test Definition Creator [sn_st_mgmt.test_def_creator]	Enables you to create the service test definition and all its related child entities. Additionally, this role includes the test definition viewer role.
Test Definition Delete [sn_st_mgmt.test_def_delete]	Enables you to delete the service test definition and all its related child entities.
Test Run Manager [sn_st_mgmt.test_manager]	Enables you to trigger or update Service test results and all its related child entities. Additionally, this role includes the product inventory viewer role.
Test Run Viewer [sn_st_mgmt.test_viewer]	Enables you to read the service test and all its related child entities.
Test Run Writer [sn_st_mgmt.test_writer]	Enables you to write the service test and all its related child entities. Additionally, this role includes the test viewer role.
Test Run Creator [sn_st_mgmt.test_creator]	Enables you to create the service test and all its related child entities. Additionally, this role includes the test viewer role.
Test Run Delete [sn_st_mgmt.test_delete]	Enables you to delete the service test and all its related child entities.
Test Integrator [sn_sprb_mgmt.test_integrator]	Enables you to create and update the service test definitions, service tests, and all their related child entities.
Service Problem Case Navigator [sn_sprb_mgmt.navigation_menu]	Enables you to navigate through the service problem cases.
Service Problem Case Agent [sn_sprb_mgmt.agent]	Enables you to create, read, and write the service problem cases. Additionally, this role includes the ability to run the test runs and view the diagnostic test results.

Roles installed with Customer Service Problem Management (continued)

Role	Description
Service Problem Case Customer [sn_sprb_mgmt.customer]	Enables you to create, read, and write the service problem cases in the customer service portal. Additionally, this role includes the ability to view the inventory.
Service Problem Case Admin [sn_sprb_mgmt.admin]	Enables you to create, read, and write the service problem case, the test runs, and the test definitions. Additionally, this role includes the ability to view the diagnostic test results and resolution task.

Tables

Customer Service Problem Management adds the following tables.

Tables installed with Customer Service Problem Management

Table	Description
Service Test Definition	Description of the service test in terms of parameters to be configured and measures to be taken. Test definitions are configurations that are required to run a particular test against the service being impacted.
Service Test Groups	Define tests for a particular service type, product model, or inventory to troubleshoot the service-related problems.
Test Definition Characteristics	Properties or attributes that are needed to be configured or placed before running the test.
Test Measure Definition	Definition a measure of a specific aspect of a product, service, or resource test, such as lost packets or connectivity status.
Threshold Rule	Rule that defines the condition (raise or clear) to achieve to apply consequences when a threshold is crossed or ceased to be crossed.
Measure Consequences	Action to take when a Threshold Rule is crossed. The action can be a prescribed action or notification.
Test Definition Relationship	Test definitions hierarchy. The relationship can be a substitution, dependency, or exclusivity relationship between test specifications.
Specification to Test Definition Relationship.	Test Definition relationship with Specification (Product / Service / Resource) or product Model.
Test Run	Test run with actual test measure values and rule violations.

Tables installed with Customer Service Problem Management (continued)

Table	Description
Test Characteristic	Description of a characteristic of Service Test through a name-value pair.
Test Measure	Measure of a specific aspect of a product, service, or resource test, such as lost packets or connectivity status.
Threshold Rule Violation	Violation of a rule that defines the Threshold Rule Definition.
Applied Consequence	The action to take when a Threshold Rule Violation occurs. The action can be a prescribed action or notification.
Diagnostic Task	Task extension. Task for an agent to trigger tests on services.
Resolution Task	Task extension. Task for an agent for repair and resolution based on test failures.
Service Problem Case	Case extension and a new case type.

Customer Service Problem Management properties

Customer Service Problem Management uses the following system properties, which are located in the System Properties [sys_properties] table.

Properties installed with Customer Service Problem Management

Property	Description
sn_st_mgmt.logging	Service Test Management logging. Enables or disables logging. • Type: True/false • Default value: false
glide.ui.sn_st_mgmt_test_measure_definition_activity.fields	Test Measure Definition activity formatter fields.
glide.ui.sn_st_mgmt_test_measure_activity.fields	Test Measure activity formatter fields.
glide.ui.sn_st_mgmt_test_definition_activity.fields	Service Test Definition activity formatter fields.
glide.ui.sn_st_mgmt_test_activity.fields	Service Test activity formatter fields.
sn_sprb_mgmt.pagination.maximum_limit	Highest number of items that can be fetched or displayed per page in an API request. • Type: integer • Default value: 100
sn_sprb_mgmt.pagination.set_limit	The number of records set by you to receive in that particular page of results in an API request.

Properties installed with Customer Service Problem Management (continued)

Property	Description
	• Type: integer • Default value: 20

Domain Separation and Customer Service Problem Management

Domain separation provides a structured and efficient way to manage complex, multi-tiered organizational environments. It enables tailored access and control, ensuring that users see only the data relevant to their domain, enhancing security and efficiency.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Introduction to Customer Service Problem Management

Customer Service Problem Management (CSPM) supports domain separation at an account level. All customer data and service problem cases have account (customer) level separation.

How domain separation works in Customer Service Problem Management

- Ensure that the account is domain separated according to the domain separation guidelines in Customer Service Management. For more information, see Domain separation and Customer Service Management.
- Customer details and service problem cases are domain separated using the account name.
- If an administrator assigns fulfillment agents and managers to work on the service problem cases for a specific domain, these agents and managers can work on these types of transactions across accounts.

Domain separated tables

- Service Problem Case
- Service Diagnostic Task
- Service Resolution Task
- Service Test Group
- Service Test Definition

- Test Measure Definition
- Test Definition Characteristic
- Test Definition Relationship
- Specification to Test Definition Relationship
- Threshold Rule
- Measure Consequence
- Test Run
- Test Characteristic
- Test Measure
- Threshold Rule Violation
- Applied Consequence

Use cases

If customer or service problem cases have an account name, an administrator can identify and separate the customer or service problem cases for different domains.

If fulfillment agents or managers are assigned to a domain, an administrator can assign them to work on the service problem cases for a specific domain (account).

How domain values are allocated to CSPM objects

CSPM objects	Domain source
Service Problem Case	Gets domain value from Account.
Service Diagnostic Task	Setting domain from Company.
Service Resolution Task	Setting domain from Company / task_for / task_for.company / default.
Service Test Definition	Setting domain of current user.
Test Measure Definition	Setting domain from Test Definition.
Test Definition Characteristic	Test Definition Characteristic
Test Definition Relationship	Setting domain from Test Definition.
Specification to Test Definition Relationship	Setting domain from test definition.
Threshold Rule	Setting domain from Test measure.
Measure Consequence	Setting domain from threshold rule.
Test Run	Setting domain from Service Diagnostic task.
Test Characteristic	Setting domain from Test Run.
Test Measure	Setting domain from Test Run.
Threshold Rule Violation	Setting domain from Test Measure.
Applied Consequence	Setting domain from Threshold Rule Violation has context menu.

Capture initiator details form

The Capture initiator details form enables you to collect the complaint requester details for an Alternative Dispute Resolution (ADR) case.

Capture initiator details form

Field	Description
Consumer	Consumer who submitted the complaint.
Contact	Contact of the business customer who submitted the complaint.
Account	Business customer who submitted the complaint.
Complaint submitted by	Type of complaint stakeholder. Select one of the following. **Regulatory** A statutory authority that oversees compliance and investigate or act on complaints. **Legal guardian** A person legally authorized to act on behalf of another individual in raising or managing a complaint. **Customer** Consumer or business customer. **Legal firm** A law firm that represents a party in handling a complaint.
Initiator name	Name of the complaint stakeholder. **Note:** If **Customer** is selected in the **Complaint submitted by** field, the field label changes to **Name**.
Preferred contact method of initiator	Mode of communication with the complaint stake holder. **Note:** If **Customer** is selected in the **Complaint submitted by** field, the field label changes to **Preferred mode of communication**.
Initiator email id	Email id of the complaint stakeholder. **Note:** If **Customer** is selected in the **Complaint submitted by** field, the field label changes to **Email id**.
Initiator mobile number	Mobile number of the complaint stakeholder.

Capture initiator details form (continued)

Field	Description
	Note: If **Customer** is selected in the **Complaint submitted by** field, the field label changes to **Mobile number**.
Initiator address	Address of the complaint stakeholder. **Note:** If **Customer** is selected in the **Complaint submitted by** field, the field label changes to **Address**.
Regulatory body name	Name of the third party regulatory body based on the location.
Intake channel	Channel through which the complaint progress must be communicated.
External reference number	Reference number related to your complaint.

Related topics

Create an Alternative Dispute Resolution case

Capture ADR information form

The Capture initiator details form enables you to collect the escalated complaint details for an Alternative Dispute Resolution (ADR) case.

Capture ADR information form

Field	Description
Product/service location	Location of the product or service where the issue is on.
Affected product/service inventory	The product or service, which the issue is facing.
Service status	Status of the service.
Category	Category for the complaint. This list contains the industry-standard categories that are based on the selected complaint type.
Subcategory	Subcategory for the complaint. This list contains the industry-standard subcategories that are based on the selected complaint category.
Priority	
Date issue occurred	Date on which your issue is occurred.
ADR received date	Date on which the complaint is received.
Short description	Brief description of the complaint.

Capture ADR information form (continued)

Field	Description
Description	Detailed summary of the complaint.

Related topics

Create an Alternative Dispute Resolution case

Glossary Customer Service Problem Management

Learn about the terms and concepts that are unique to Customer Service Problem Management.

C

Glossary terms are grouped alphabetically.

configuration item (CI)

A physical entity, such as a computer or router; a logical entity, such as an instance of a database; or a conceptual entity, such as a requisition service. CIs can be managed and tracked through Configuration Management and stored in the Configuration Management database (CMDB).

D

Glossary terms are grouped alphabetically.

Diagnostic task

A task assigned to an agent to run diagnostic tests on services to identify the root cause of a problem.

M

Glossary terms are grouped alphabetically.

Measure consequence

An action or response triggered when a threshold rule is violated, such as sending a warning or creating a repair task. To learn more, see Define measure consequences for the threshold rules.

N

Glossary terms are grouped alphabetically.

Northbound API

APIs used during the design phase to create and manage test definitions, characteristics, and measures within Customer Service Problem Management. To learn more, see Customer Service Problem Management data model.

R

Glossary terms are grouped alphabetically.

Resolution task

A task for an agent to repair and resolve issues based on failed test results.

S

Glossary terms are grouped alphabetically.

Service problem case

A record representing a customer-reported issue or a network fault, tracked through its lifecycle from verification to closure.

T

Glossary terms are grouped alphabetically.

Test group

A collection of related tests (manual or automated) used to diagnose service problems for a specific service type, product model, or inventory. To learn more, see Setting up a test group.

Test definition

A configuration that specifies the parameters and metrics for a particular test, including what is measured and how.To learn more, see Setting up test definitions.

Test measure definition

A unique metric or parameter to be measured during a test, such as speed, connectivity, or packet loss. To learn more, see Define test measure definitions for a service test.

Threshold rule

A rule that sets acceptable performance or quality limits for a service. If test results exceed or fall below these thresholds, actions are triggered. To learn more, see Define threshold rules for a test measure definition.

Customer Success Management

The ServiceNow® Customer Success Management application enables service providers to streamline, automate, and measure critical workflows across the entire enterprise customer journey—from onboarding and adoption to renewals.

Important: Account Lifecycle Events has been renamed to Customer Success Management in Zurich.

Get started

By embedding workflow automation into customer success management, Customer Success Management helps providers enhance customer experiences, accelerate time to value, and maximize return on investment. It also fosters seamless collaboration between the accounts, sales, and delivery teams, all within the unified ServiceNow AI Platform.

Explore	Configure
Learn about the key features and benefits of Customer Success Management	Plan and customize Customer Success Management to meet your needs

Use	Reference
Use Customer Success Management to manage the entire customer lifecycle	Get information about the data model and installed components

Additional resources

- Learn more about what's new and changed, see the Customer Success Management release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Success Management 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 ServiceNow Impact.
- Connect with other Customer Success Management users at Now Community.

Field Service Management for Telecommunications

The ServiceNow Field Service Management for Telecommunications (FSMT) application enables you to manage the field service workflow for the telecommunications customers. Use this application to streamline the appointment booking, service delivery, and assurance processes.

The ServiceNow Field Service Management for Telecommunications (FSMT) application integrates with the Field Service Management (FSM) to manage and streamline field service workflows for the telecommunications industry. The FSMT supports the TM Forum-aligned Open APIs and their functionalities that enable an open digital ecosystem. These APIs promote faster integration with Field Service Management to manage appointment booking, service delivery, and assurance processes.

To learn more about Field Service Management application, see Field Service Management.

Manage appointments for telecommunication services

Manage the appointments for the field services to enable the installation, activation, and site assessments that are needed for connectivity services.

With the use of the ServiceNow Telecommunication Open API application, you create appointments from your system for the connectivity-related field services. You can book an appointment on an existing work order and assigned it to the field service agent. To learn more about booking appointments, see Managing appointments.

The Telecommunication Open API application uses the TM Forum 646 API to support the external system to create and manage appointments for the field services.

This feature supports the following:

- Supports POST operation for appointment via `appointment management API`.
- Understands the appointment data model available in the Field Service Management application.
- Supports POST operation to create an appointment in the Field Service Management application for a work order.
- Supports required validations for the incoming data for appointment creation for an available time slot via `search time slot API`.
- Reschedule appointments for a#work order

Configuring the appointment booking feature

To manage appointment bookings in your system, you must create, modify, or enable the application configuration and the individual service configurations. Do the following steps to configure the appointment booking feature:

1. Configure an appointment booking record producer.
2. Create or modify service configuration for Appointment Booking.
3. Configure variables in a record producer for appointment booking.

Manage work orders for telecommunication services

Manage the work orders for the field services to support the installation, activation, and site assessments that are needed for connectivity services.

With the use of the ServiceNow® Telecommunication Open API `(com.sn_tmf_api)` application, you create and manage work orders from your system for the connectivity-related field services. To learn more about managing work orders in Field Service Management, see Manage work orders.

This feature supports the following:

- Create a new work order
- Update an existing work order
- Fetch the details of a work order
- Cancel a work order

The Telecommunication Open API application uses the TM Forum 697 Service Order Management API specification to support the external system to create and manage work orders for the field services. To learn more, see Work Order Management API.

Now Assist for Sales CRM for Telecommunications

Use the ServiceNow® Now Assist for Sales CRM for Telecommunications application to automate enrichment and fulfillment tasks. This helps customers introduce new offerings without the need to build complex subflows. These AI Agents automatically suggest new tasks based on similarities with previous orders and also provide flexibility by auto-correcting the agent's inputs related to new tasks.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Get started

Explore	Use
Learn more about Now Assist for Sales CRM for Telecommunications	Use generative AI capabilities offered by Now Assist for Sales CRM for Telecommunications

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available . Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community AI & Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy , which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal .

For more information, see the Now Assist documentation .

Exploring Now Assist for Sales CRM for Telecommunications

With the Now Assist for Sales CRM for Telecommunications application, you can use standalone AI agents to create a customer move order capture journey, create enrichment tasks, identify the tasks required for domain orders by using historical data from similar orders.

Using agentic workflows in Now Assist for Sales CRM for Telecommunications

Use the Now Assist for Sales CRM for Telecommunications to complete tasks autonomously.

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

Important: By default, all agentic workflows and AI agent records are read only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Standalone agents in Sales CRM for Telecommunications

Use these standalone AI agents to autonomously complete Sales CRM for Telecommunications tasks.

Standalone agents in Now Assist for Sales CRM for Telecommunications

The following AI agents are available with Now Assist for Sales CRM for Telecommunications:

- Order enrichment AI agent
- Order fulfillment AI agent
- Move order voice AI agent
- Order fallout AI agent
- Image to task plan template AI agent

Now Assist for Sales CRM for Telecommunications AI agent Move order voice AI agent

Use this agent to automatically create a customer move order capture journey.

Move order voice AI agent overview

The move order voice AI agent helps to manage your inventory by:

- Collecting information over the phone.
- Matching the gathered information to existing records in the system.
- Sharing relevant details.
- Creating a move order based on the captured information.

To create a move order, AI agent collects these details:

- Existing service location
- Product or services to be moved
- New service location

To integrate AI agent with supported third-party CCaaS (Contact Center as a Service) providers, see Integrating voice assistant with CCaaS provider.

To add tools and information, see Add tools and information to an AI agent for details.

Role required: sn_customerservice.consumer

Important: In the select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Configure Move order voice AI agent

To configure the AI agent:

1. Navigate to **All** > **Assistant Designer** > **Assistants**.
2. In Now Assist Voice Deployment tile, select **Edit**.
3. Select **Settings** tab and review the details.

To create SoftPIN, see .

Move order voice AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Move Order Voice AI agent**.

Now Assist for Sales CRM for Telecommunications AI agent collection order enrichment AI agent

Use the order enrichment AI agent to collect customer order information, identify if the order needs enrichment, and create enrichment tasks.

Order enrichment AI agent overview

The order enrichment AI agent creates a task and triggers the order fulfillment AI agent on its completion. On closure of the enrichment task, the order fulfillment agent is invoked.

For each top order line Item (OLI) and its child OLIs, the order enrichment agent uses historical data from similar orders to determine which enrichment tasks are required.

To activate the Group Action Framework (GAF), see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications.

If needed, the outcome of the order tasks can be modified by the agent.

When an OLI is created, if an enrichment process isn't defined for that order line specification, a place order task is created. When this task is assigned to an agent, it triggers the order enrichment AI agent for this order line item.

If the specification enrichment tasks defined in the decision table aren't available to create the enrichment tasks, the default flow trigger enrichment AI agent is triggered to create the enrichment tasks for an order line item during the enrichment process. To configure the order enrichment flows using Decision Tables, see Configure order enrichment flows using Decision Tables.

To modify the order enrichment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Role required: sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Order Enrichment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Enrichment AI agent**.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications

Activate the Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

Before you begin

Select the Now Assist for Sales and Order Management for Telecommunications application scope.

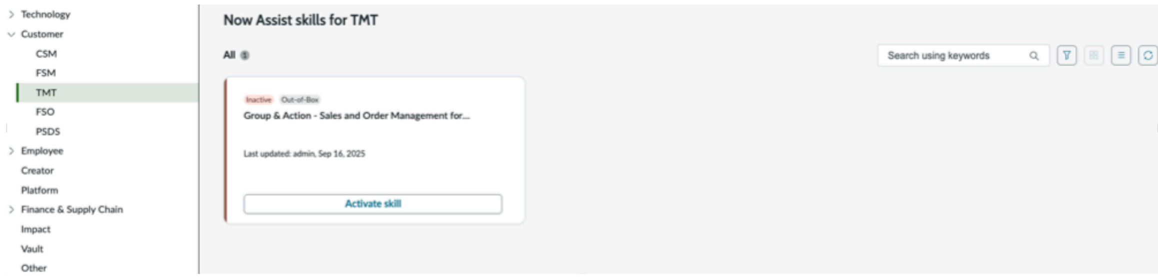
In the Request definitions, select **Index All Tables**.

In the request_characteristic, select **Index All Tables**.

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Sales and Order Management for Telecommunications, select **Activate skill**.



3. **Optional:** On the Group & Action - Sales and Order Management for Telecommunications form, change the values by selecting **Edit**.
4. Select **Save and continue**.
5. On the **Review and activate** tab, select **Done**.

Result

GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Sales CRM for Telecommunications AI agent collection order fulfillment AI agent

Use the order fulfillment AI agent to identify the tasks required for domain orders by using historical data from similar orders.

Order fulfillment AI agent overview

The order fulfillment AI agent uses historic order tasks to create the order tasks. If the historic data doesn't return any results, then a large language model (LLM) is used to get the response. After decomposition, the order fulfillment AI agent creates order tasks by checking historical and applicable tasks.

Based on the domain order, this agent retrieves a list of tasks that must be fulfilled. For each such domain order, the agent uses historical data from similar orders to find all such tasks.

If the Product offering or Category fulfillment tasks defined in the decision table aren’t available to create the fulfillment tasks for product, service, and resource, the default flow Service order trigger fulfillment AI agent, resource order trigger fulfillment AI agent, and Product order trigger fulfillment AI agent are considered to create the fulfillment tasks for an order line item during the fulfillment process. For more information on configuring decision tables, see Decision tables.

When a domain order is created, if a fulfillment process isn’t defined for that domain order specification category, a place order task is created. When this task is assigned to an agent, it triggers the order fulfillment AI agent for this domain order.

To modify the order fulfillment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

The order fulfillment AI agent adds tasks apart from the generated tasks from Group Action Framework (GAF). To activate the GAF, see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications. The GAF and AI search are both used for order tasks.

Role required: sn_somt_gen_ai.sales_and _order_fulfillment_ai_agent

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Order Fulfillment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Fulfillment AI agent**.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

Now Assist for Sales CRM for Telecommunications AI agent Order fallout AI agent

Use the AI agent to automatically create the fallout records based on reported issues on the task's notes.

Order fallout AI agent overview

Use the Order fallout AI agent to:

- Eliminate manual review of completed orders by automatically analyzing work notes.
- Reduce manual effort in the fallout creation and assignment process.
- Ensure that all relevant fallouts are captured and linked to original order tasks.

The agent automatically creates a fallout in case of an order task failure. The agent identifies the correct category in which the fallout must be created. The agent doesn't create a fallout if the fallout is already created.

This agent analyzes the order fulfillment tasks when a task status is changed to on hold and automatically creates relevant fallout records based on issues identified in work notes. It leverages Now LLM Service to match task observations with predefined fallout types, streamlining the post-fulfillment issue tracking process.

Order fallout AI agent performs the following task:

1. Analyzes all the order task work notes.
2. Identifies reported issues.
3. Matches issues with available fallout types.
4. Creates appropriate fallout records.

To modify the Order fallout AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

To add tools and information, see Add tools and information to an AI agent for details.

Important: In the Select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Role required: sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent

Order fallout AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Select **Order fallout AI agent**.

Testing the AI agent

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Now Assist for Sales CRM for Telecommunications AI agent Image to task plan template AI agent

Use the AI agent to create a task plan template for a given specification based on the uploaded image file.

Image to task plan template AI agent overview

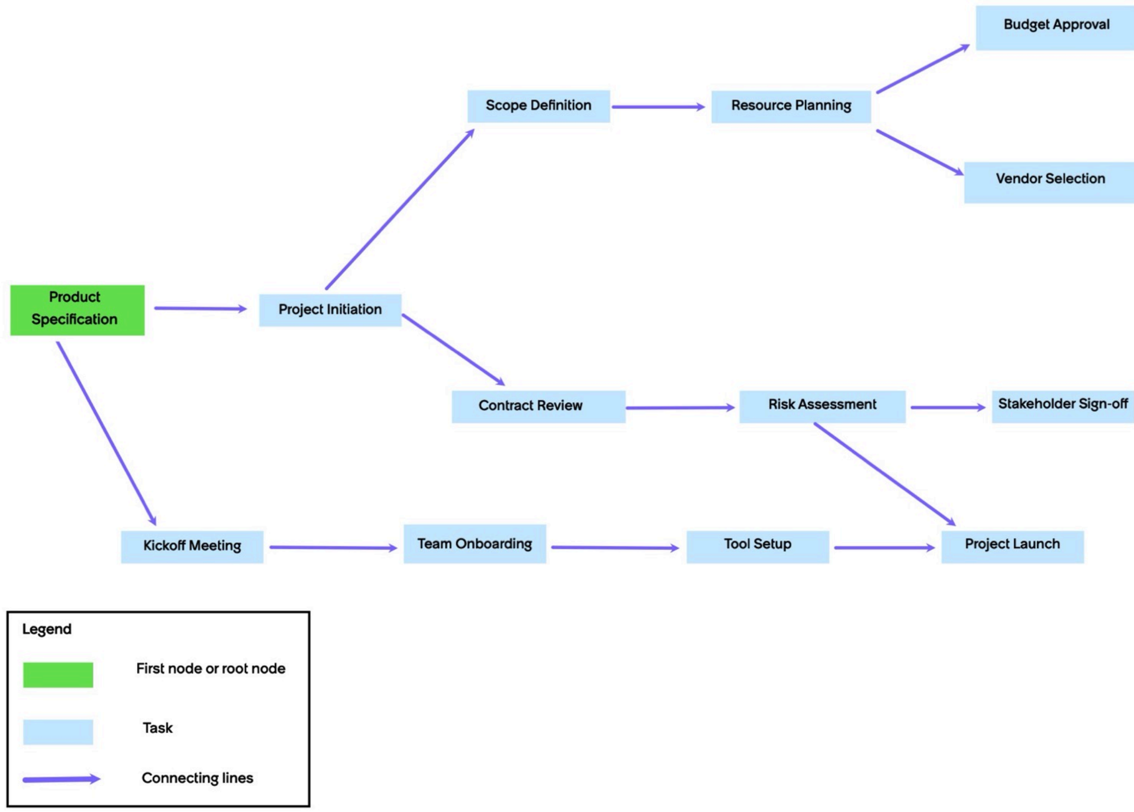
This agent processes uploaded image file, extract tasks and tasks dependencies and store them as a task plan template for a given specification and order action.

The AI agent integrates with order action catalogs, file upload services, and template management systems to produce standardized task plan templates with dependency graphs and action mappings. NOW LLM does not support this agent.

The uploaded image should define the tasks and the tasks flow and dependency in a clear chart, with clear text visualization.

From the image the agent always expects the first node or the root node as the specification and not tasks and all others will be tasks.

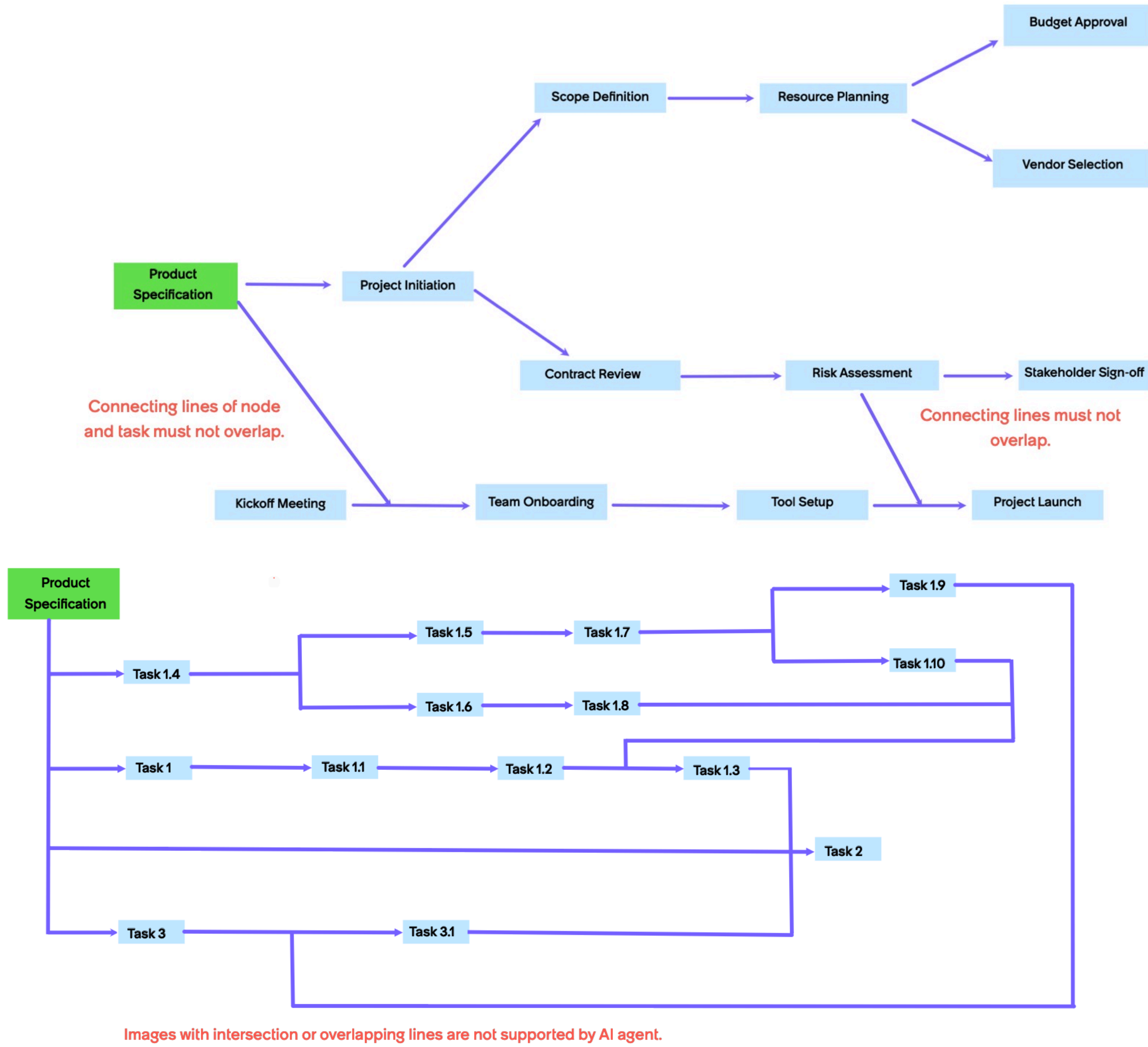
Example image supported by AI agent for task plan template



Guidelines for image:

- Size of the image must be less than 10MB.
- Format of the image must be PNG, PDF, JPG.
- Connecting lines of tasks and node must not overlap.

Images not supported by AI agent for task plan template



To modify the Image to task plan template AI agent, Duplicate an agentic workflow and adjust the settings according to your requirements.

To add tools and information, see Add tools and information to an AI agent for details.

Role required: sn_task_plan.admin and sn_prd_pm.product_catalog_admin

Important: In the select channels and status page, make sure that the **Active** button is turned on to activate the AI agent.

Image to task plan template AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Image to task plan template AI agent**.

Testing the AI agent

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Now Assist for Telecommunications, Media and Technology (TMT)

Use the ServiceNow® Now Assist for Telecommunications, Media and Technology (TMT) application to summarize service problem cases, account onboarding cases, engagements, touchpoints, generate the case resolution notes, and summarize tests. You can enable your agents to understand the case context and test results so that they can propose quicker resolutions to your customers. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Get started

Explore	Configure	Use
Learn more about Now Assist for Telecommunications, Media and Technology (TMT)	Configure the Now Assist for Telecommunications, Media and Technology (TMT)	Use generative AI capabilities offered by Now Assist for Telecommunications, Media and Technology (TMT)

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community AI & Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for case summarization) and test run information (for test summarization). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Telecommunications, Media and Technology (TMT)

With the Now Assist for Telecommunications, Media and Technology (TMT) application, your agents can use generative AI to summarize service problem cases, account onboarding cases, engagements, touchpoints, internal plays, customer plays, successive initiatives, tests, risk signal and issues, and generate resolution notes. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

Overview of Now Assist for TMT

The following generative AI capabilities are available:

Telecommunications Now Assist capabilities

- The Telecom Customer 360 insights generation automatically generates AI-powered insights for a customer or consumer account.
- A service problem case sentiment analysis enables you to understand the customer sentiment on a service problem case.
- A comprehensive summary of linked records enables you to generate a summary of linked records of an escalated complaint in the Alternative Dispute Resolution (ADR) case.
- A deadlock letter draft generation enables you to generate the deadlock letter for an ADR case. If the customer rejects the resolution plan, you can share the deadlock letter with the customer.
- A resolution notes generation enables the agent to create a resolution plan for an escalated complaint in the ADR case record.
- A service problem case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain several details, including conversation with customers or other agents, generating a summary can help agents to get a quicker understanding of the case.
- The case resolution notes can help an agent to wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar issues.
- A test summary assists an agent with obtaining the test results that were generated after executing the test runs. It provides a high-level overview of the test run in a clear format.
- Knowledge generation can help an agent to streamline content creation. An agent can automatically generate knowledge articles by using the relevant data from the case record after proposing a resolution or closing the case. By not having to generate knowledge articles manually, this feature can save your agents valuable time and effort.
- The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, and resolution details.
- Remote Hands Agents can generate a case summary from both the Remote Hands Case table and the CSM/FSM Configurable Workspace using the Summarize option. The summary provides a consolidated overview of the case, including key case details and related case summary for quick understanding.

Technology Now Assist capabilities

- A draft closure notes for a risk signal automatically generates closure notes and closes eligible risk signals at the end of each day based on the status of their associated risk solutions.
- A lookup similar engagements skill to automatically generate a product adoption roadmap based on engagement data and insights from similar engagements.
- A renewal insight engine skill to analyze the renewal likelihood and expansion potential of an engagement or contract and generate recommended actions.

- An account onboarding case summary enables an agent to gather case context on onboarding cases. Agents can generate a summary to gain an understanding of any stage of the onboarding cycle.
- An engagement record summary can enable an agent to summarize initiatives, outcomes, risks, and internal plays associated with an engagement.
- A touchpoint record summary can enable an agent to summarize meetings and emails exchanged during the engagement life cycle.
- A customer play record summary that includes details of the record and all the associated tasks.
- A internal play record summary that includes details of the record and all the associated tasks.
- A success initiative record summary that includes details of the record and all the associated tasks.
- Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies.
- Transform map assist enables providers to automatically generate transform maps between provider and consumer tables.
- The risk signal and issues summarization skill provides you with a summary of risk history and resolution context.

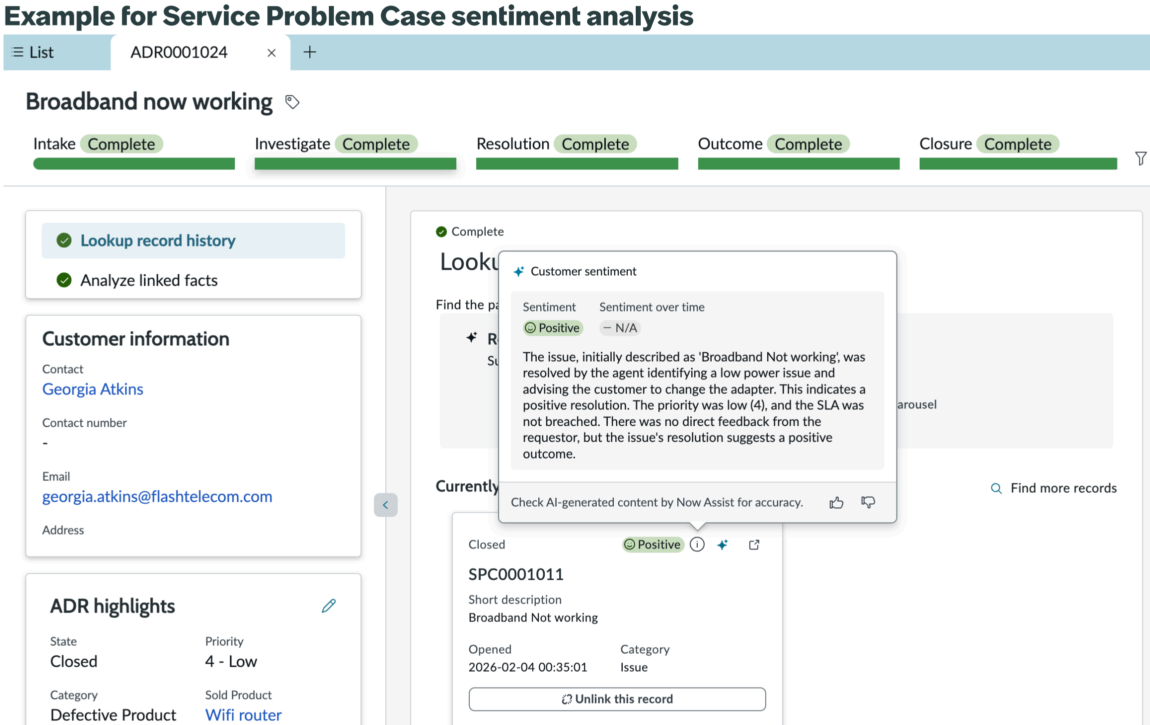
Skills

The Now Assist for TMT application includes the following generative AI skills:

Service Problem Case sentiment analysis

Sentiment analysis helps agents to identify the most current sentiment on the service problem cases. This skill enables you to select the relevant linked records for ADR case record.

Example for Service Problem Case sentiment analysis

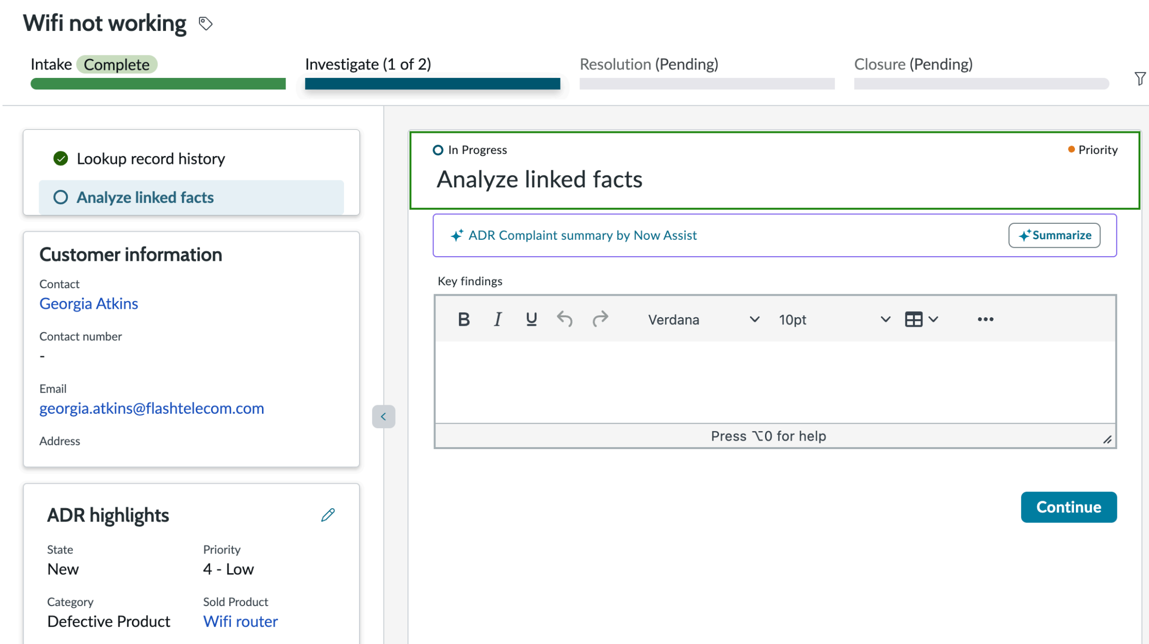


Comprehensive Summary of Linked Records

The comprehensive summary of linked records skill summarizes the details of the case records that are linked to an escalated complaint in an ADR case. The comprehensive summary includes the following sections:

- Chronological sequence of events
- Identified findings
- Resolution steps completed
- Outstanding gaps
- Recommended direction

Example for comprehensive summary of linked records

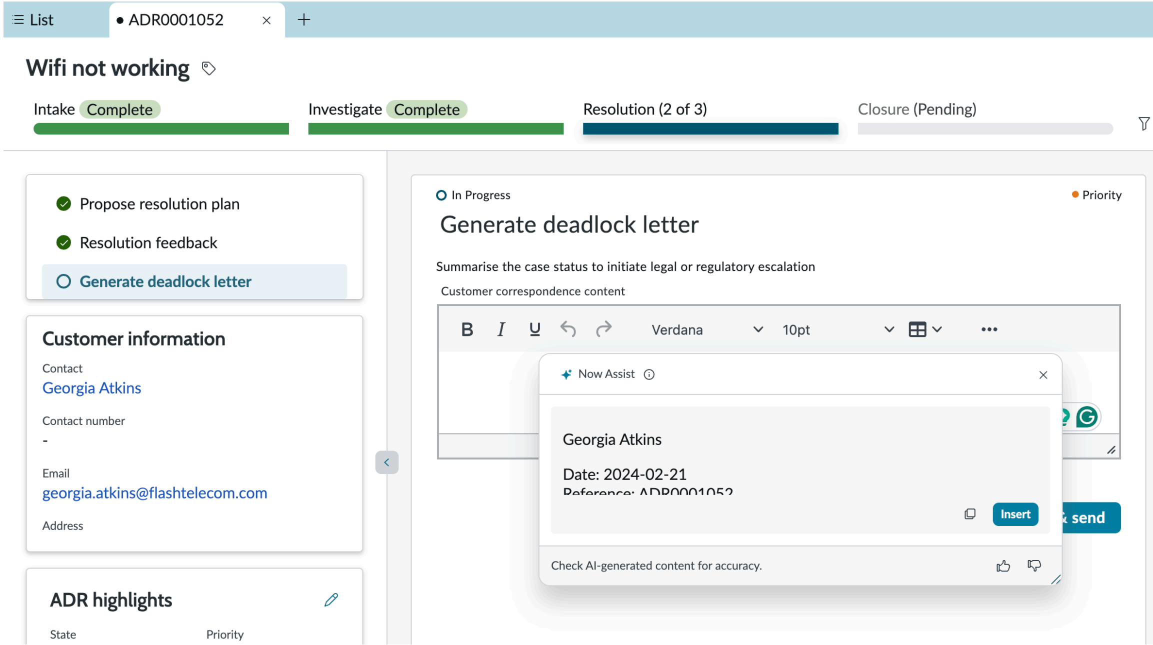


Deadlock letter draft generation

The deadlock letter draft generation skill creates the deadlock letter for a customer complaint. You can generate the deadlock letter when the customer rejects the complaint resolution and opt for legal procedures. The deadlock letter draft includes the following sections:

- Summary of Your Complaint
- Our Investigation and Response
- Chronological sequence of events
- Identified findings
- Resolution steps completed

Example for deadlock letter draft generation

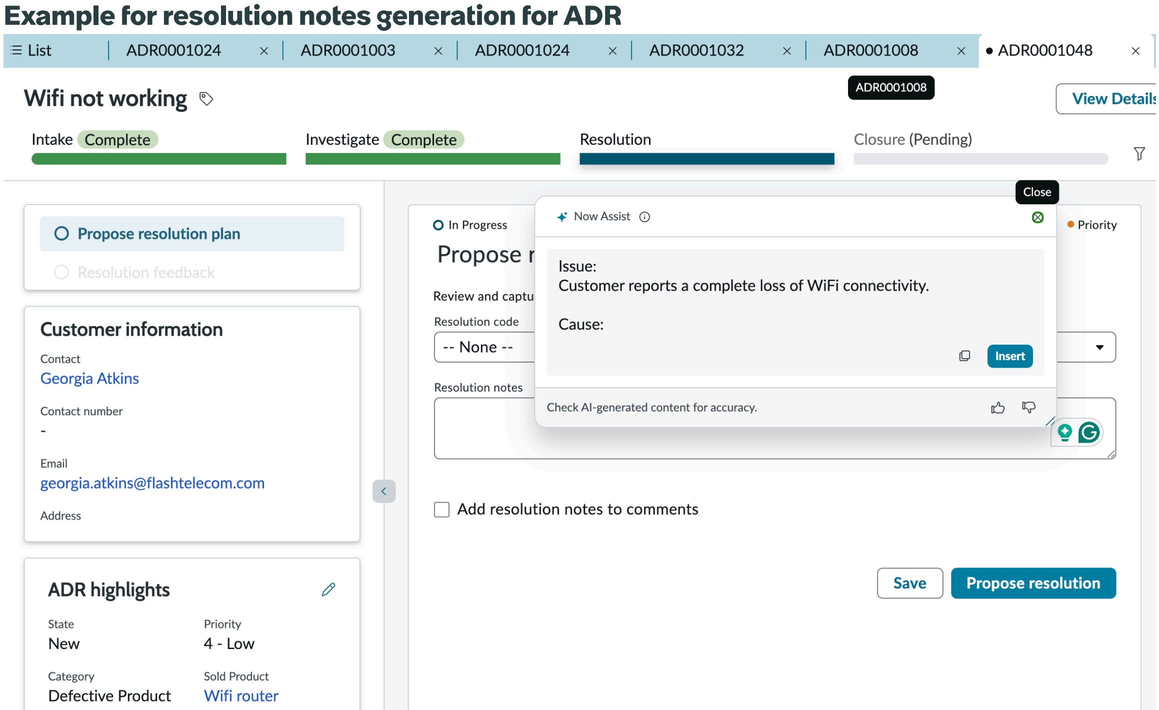


Resolution notes generation for ADR

The resolution notes generation skill creates the resolution notes for an escalated customer complaint in the ADR case record. The resolution notes generation includes the following sections:

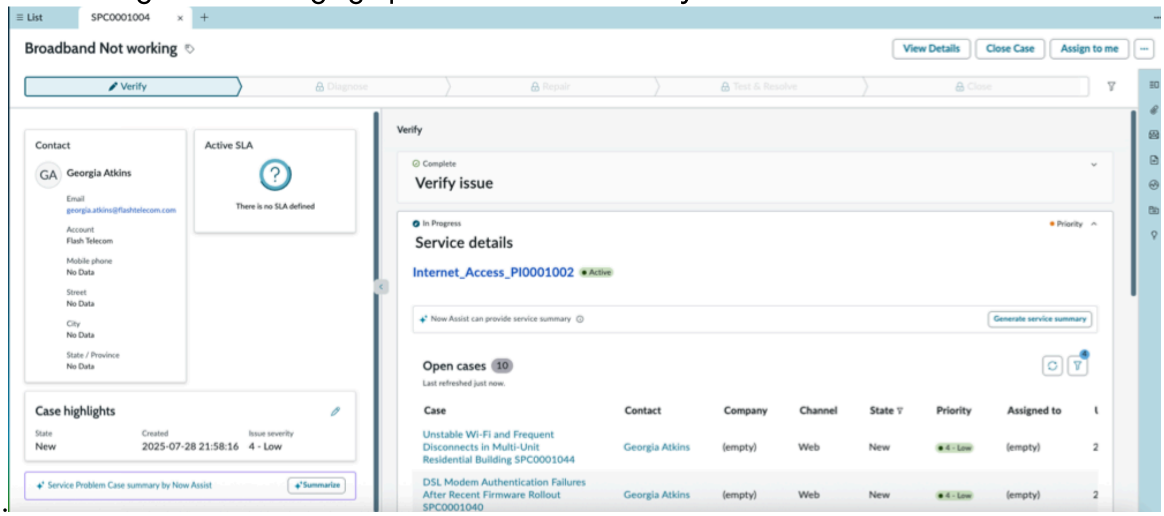
- Issue
- Cause
- Resolution steps

Example for resolution notes generation for ADR



Customer service summary

Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary



skill.

Service Problem Case summarization

Generates a summary of a service problem case, including the issue and the actions taken. An agent can generate a summary of a case to understand the case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The service problem case summarization skill generates a service problem case summary and displays it previous the Case highlights card. The summary includes the information that the agent or customer enters in the following service problem case record fields:

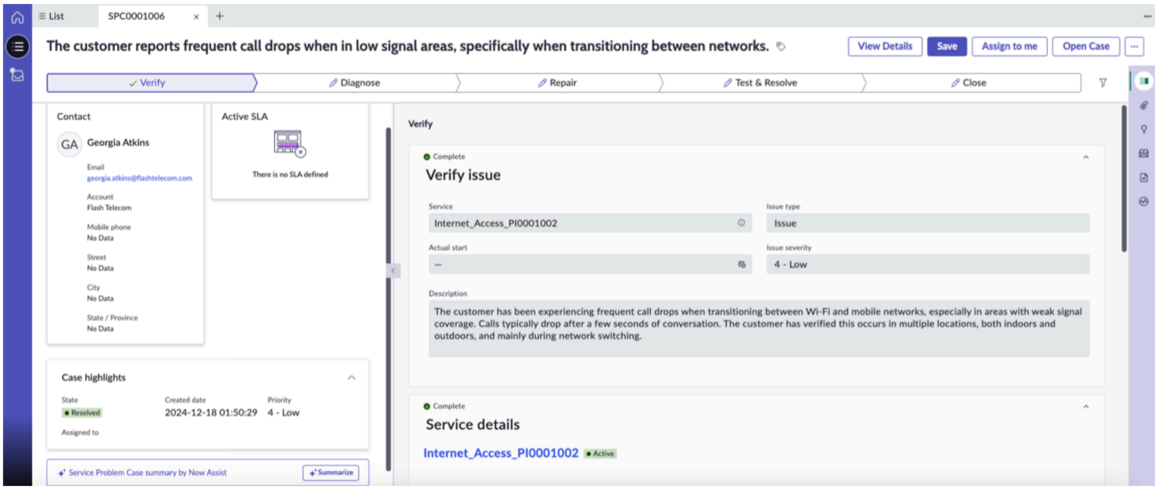
- Short description
- Description
- Work notes
- Additional comments
- Diagnostic Task

  Fields:

  - Description
  - Short description
  - Work notes
  - state
  - sys id
- Resolution Task

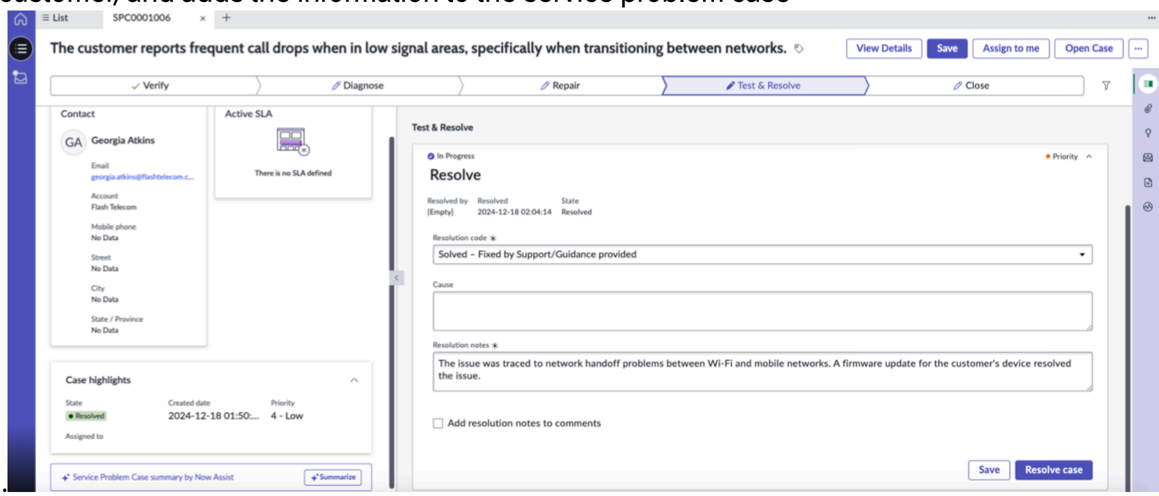
  Fields:

  - Description
  - Short description
  - Work notes
  - state



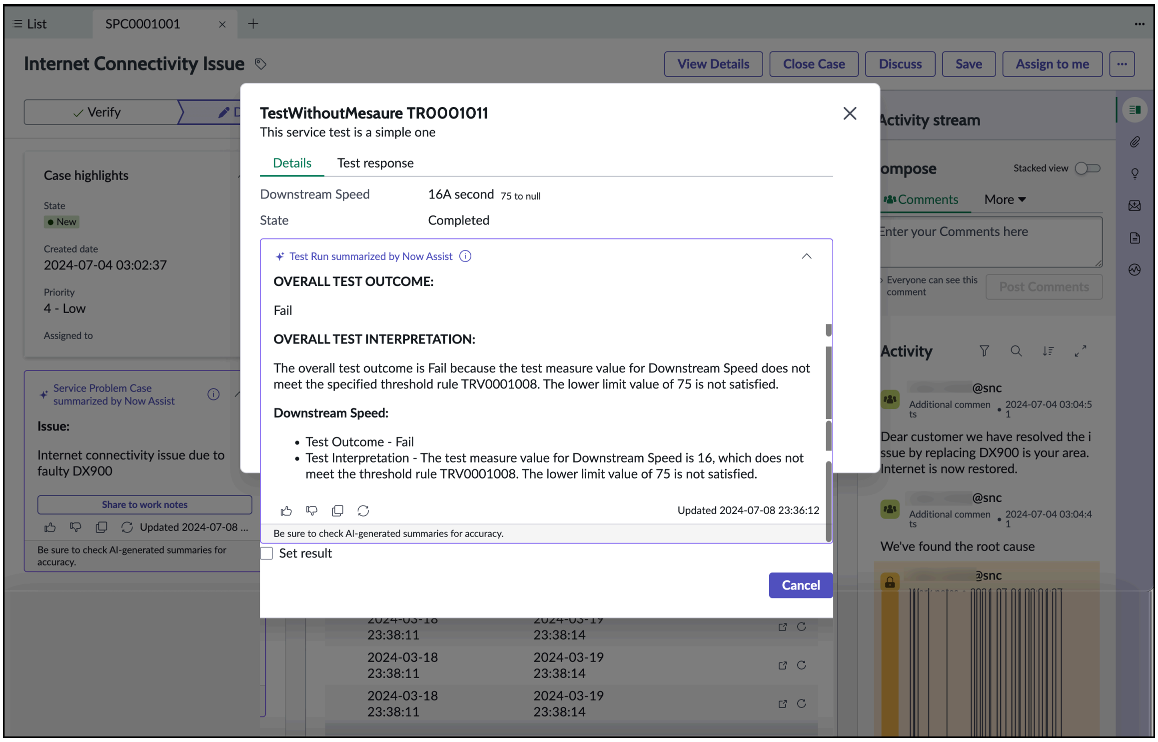
Resolution notes generation

Generates resolution notes for a service problem case, proposes the resolution to the customer, and adds the information to the service problem case record.



Test summarization

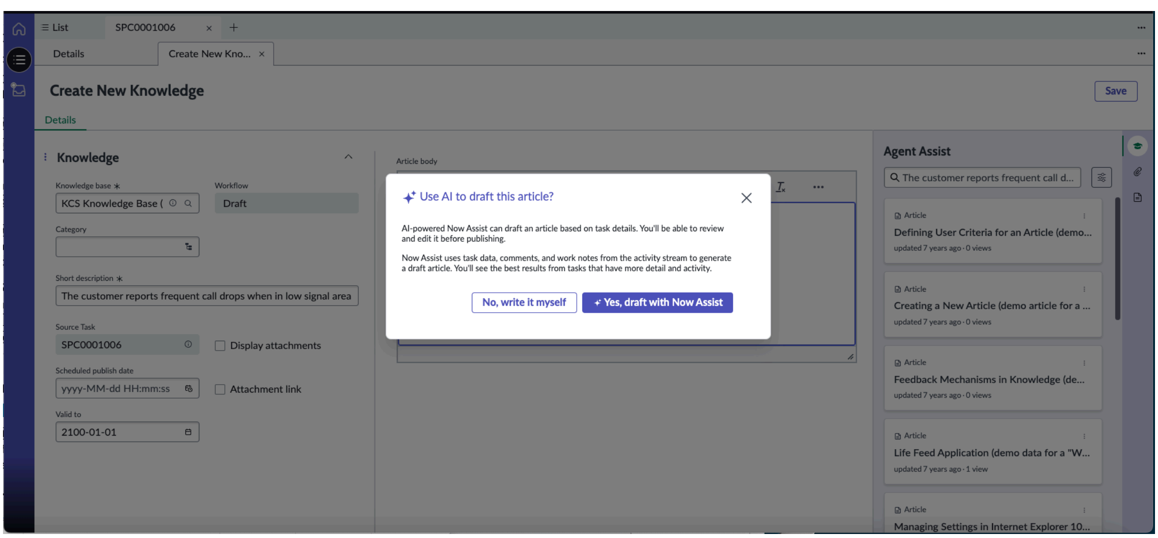
Generates a test run summary after the test is executed. It includes the main points covered during the test execution, including the test output, test interpretation, and other defined test parameters. An agent can generate a test summary of the executed tests to identify the root cause of the problem.



Knowledge generation

Generates a knowledge article from a case after proposing a resolution or closing the case.

The knowledge generation skill displays a pop-up window that an agent can use to generate a knowledge article that is based on similar cases and review it before publishing the knowledge article draft.

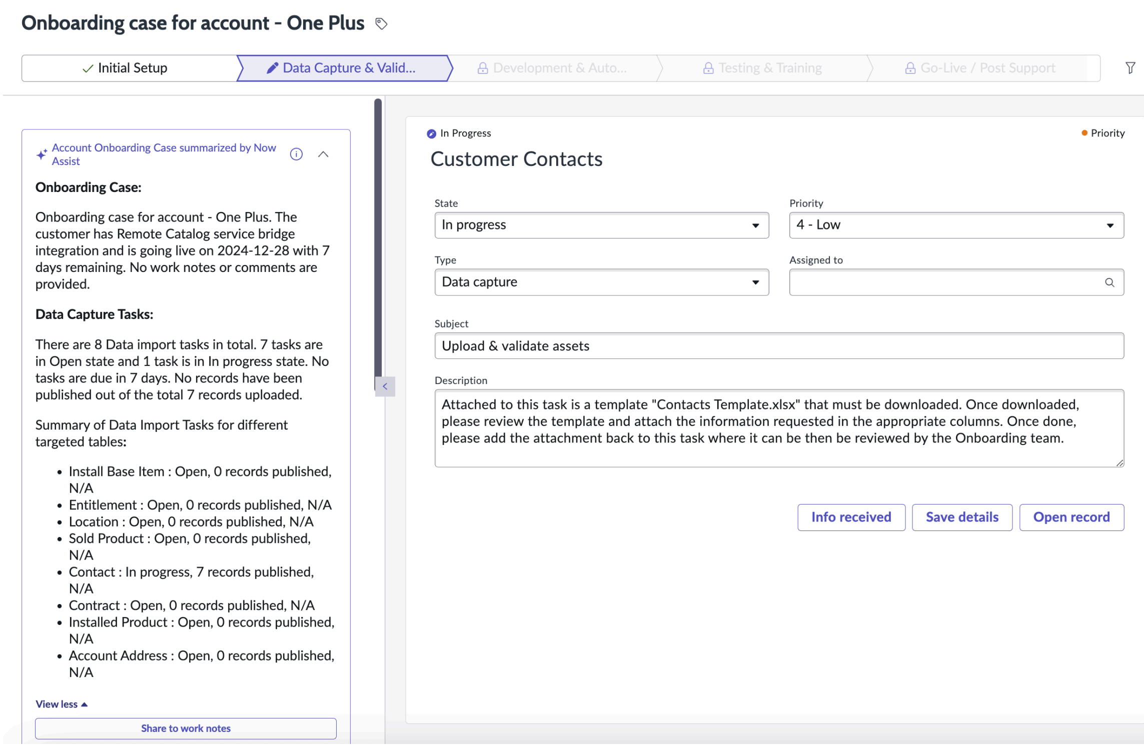


Account onboarding case summarization

Summarizes an account onboarding case, including details about each stage in the account onboarding lifecycle. Agents can quickly get up to speed on the status of the onboarding case and case tasks with a high-level summary of key points of information.

The account onboarding summarization skill generates an onboarding case summary and displays it before the Activities card. The summary includes the information that the agent enters during the following stages of the account onboarding lifecycle:

- Initial Setup
- Data Capture & Validation
- Development & Automation
- Testing & Training
- Go-live & Post-Support

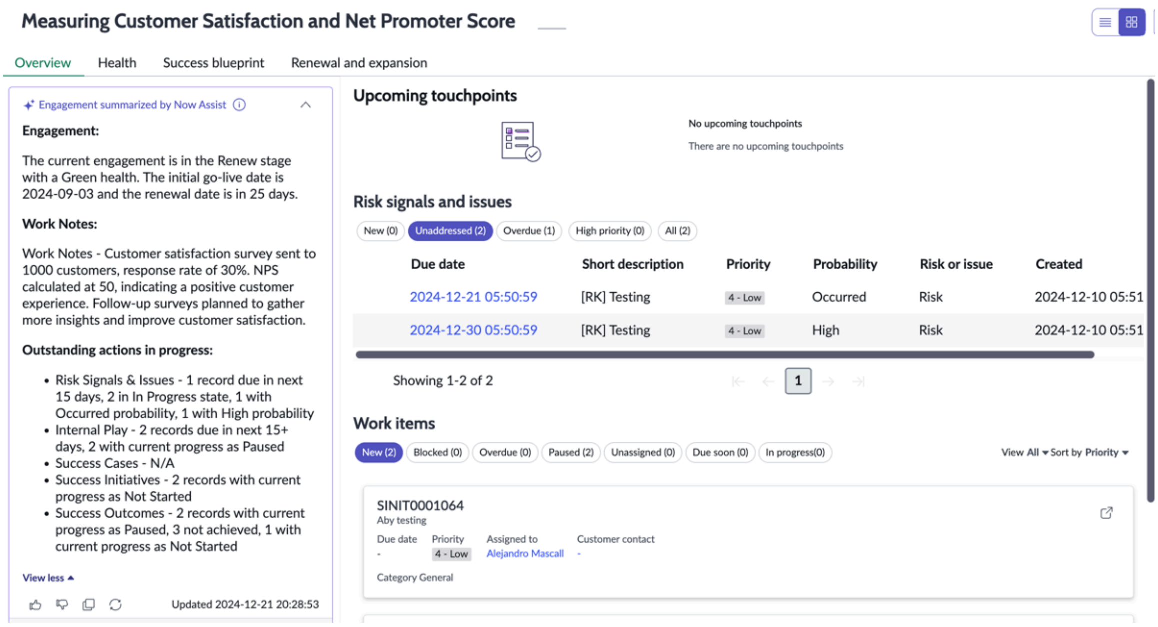


Engagement summarization

Generates the summary for an engagement including preconfigured parameters such as risks, initiatives, outcomes, cases, and internal plays. Customer success managers can quickly get up to speed on all activities and the overall engagement with a high-level summary of the key points of information.

The engagement summarization skill generates a summary of the engagement including the status, go-live date, renewal date, worknotes, and any outstanding actions and displays it before the Account details card. The summary includes the information that the agent enters in the following engagement record fields:

- Title
- Description
- Work notes

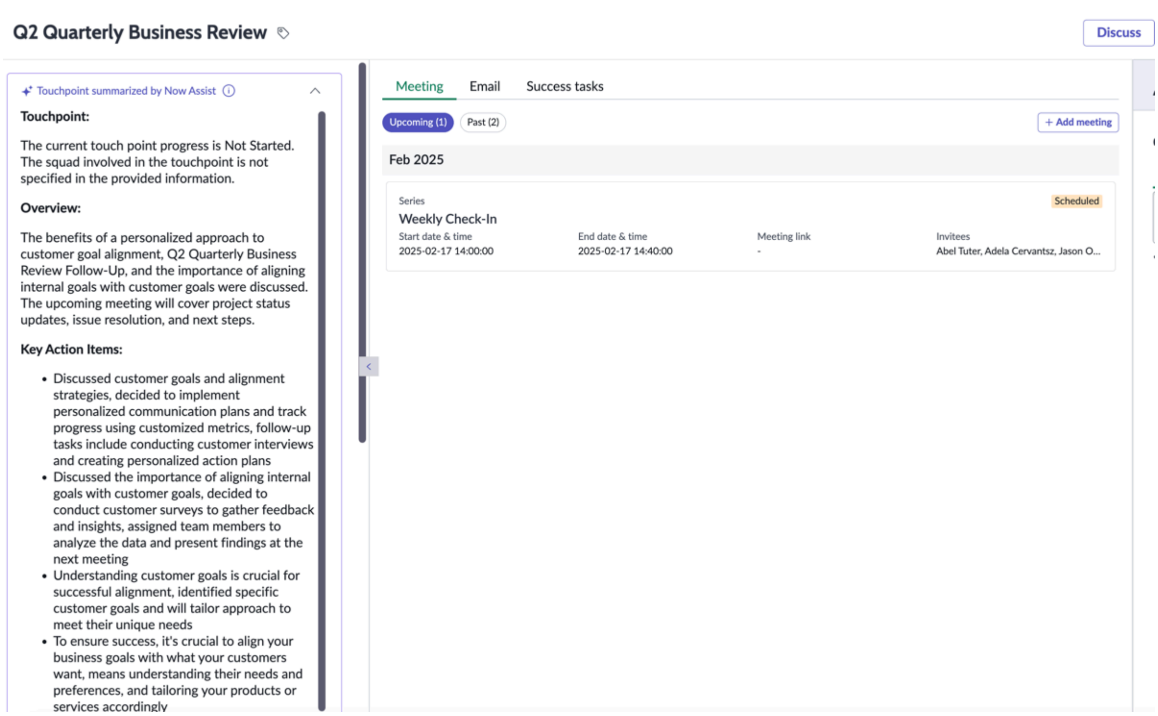


Touchpoint summarization

Generates a summary of the different touchpoints in the engagement lifecycle. Customer success managers can get a quick summary of all meetings and emails exchanged between the different stakeholders and any follow up activities.

The touchpoint summarization skill generates a summary of the touchpoints including the meeting agenda, meeting type, type of meeting, and emails. The summary includes the information that the agent enters in the following touchpoint record fields:

- Subject
- Description
- Work notes
- Additional comments



Transform mapping assist

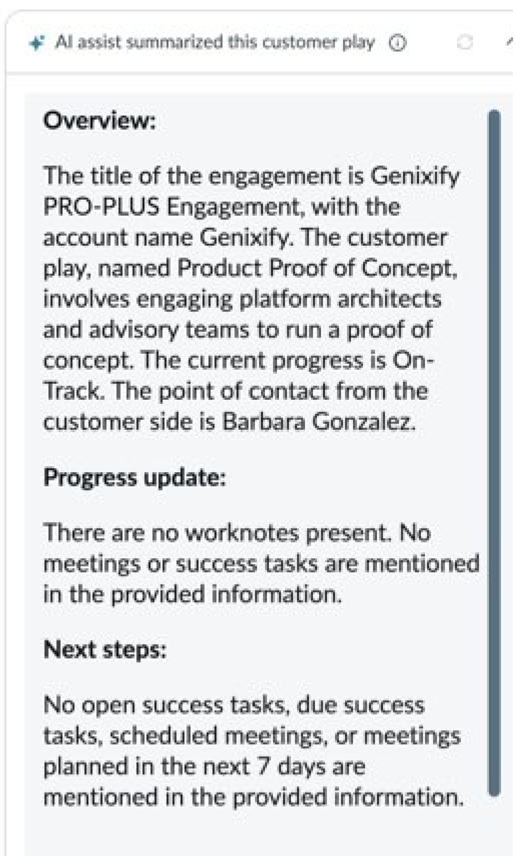
Uses the NOW Large language model (LLM) to enable Service Exchange providers to automatically generate a transform mapping between provider and consumer tables. This skill enables providers to streamline the transformation mapping process by reducing errors and improving overall efficiency.

Customer play summarization

Generates a summary of the customer play and includes the record details and associated customer play tasks.

The customer play summarization skill generates a summary of the customer play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

- Overview
- Progress updates
- Next steps

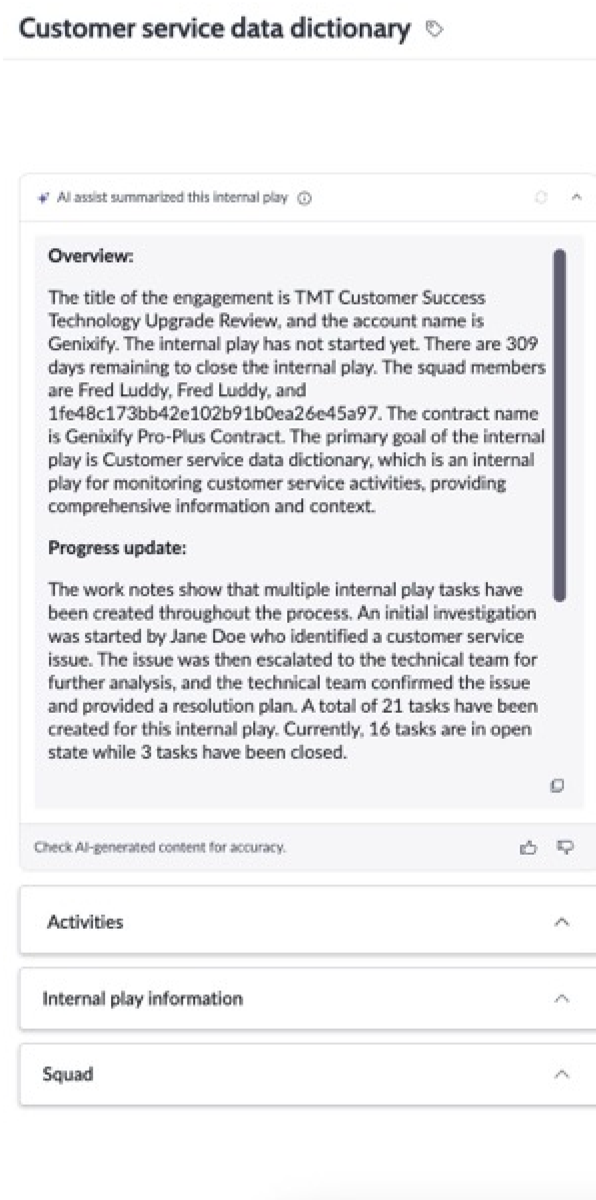


Internal play summarization

Generates a summary of the internal play and includes the record details and associated internal play tasks.

The internal play summarization skill generates a summary of the internal play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

- Overview
- Progress updates
- Next steps

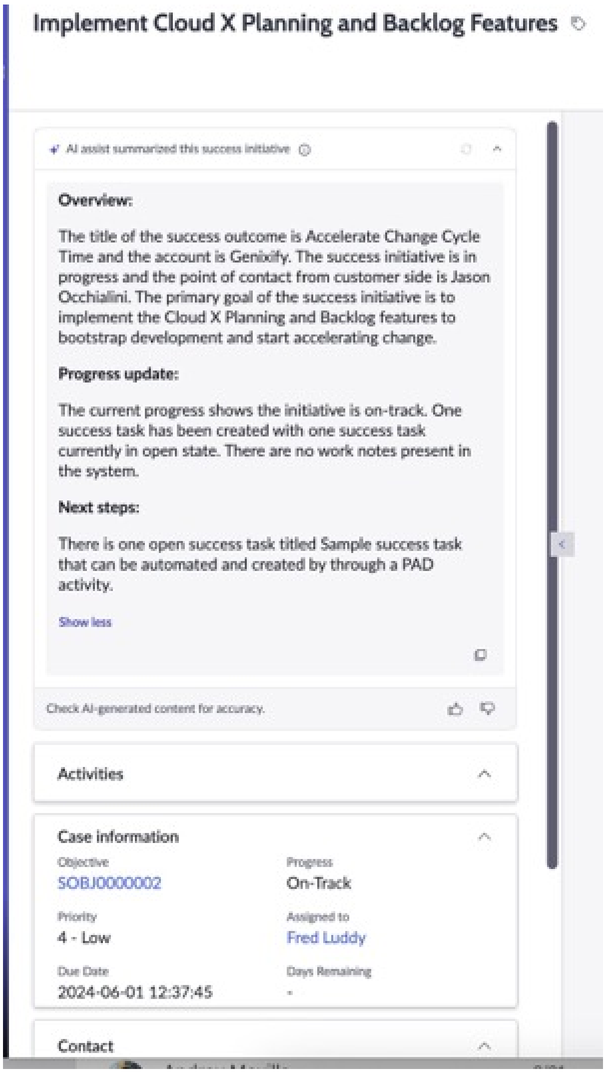


Success initiative summarization

Generates a summary of the success initiative and includes the record details and associated success tasks.

The success initiative summarization skill generates a summary of the success initiative record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress updates
- Next steps



Analyze metric data trend

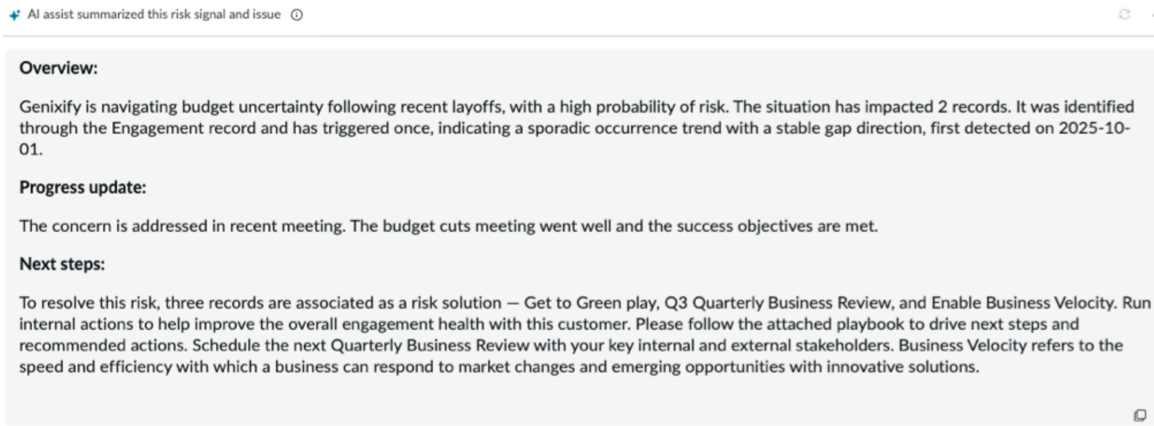
Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies. Provides clear actionable insights that enables the Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection monitor engagement health agentic workflow to make informed decisions and take appropriate actions.

Risk signal and issues summarization

Generates a summary from a risk signal and issues summarization record, risk solution and risk occurrences.

The risk signal and issues summarization skill generates a summary of the risk signal and issues record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress update
- Next steps



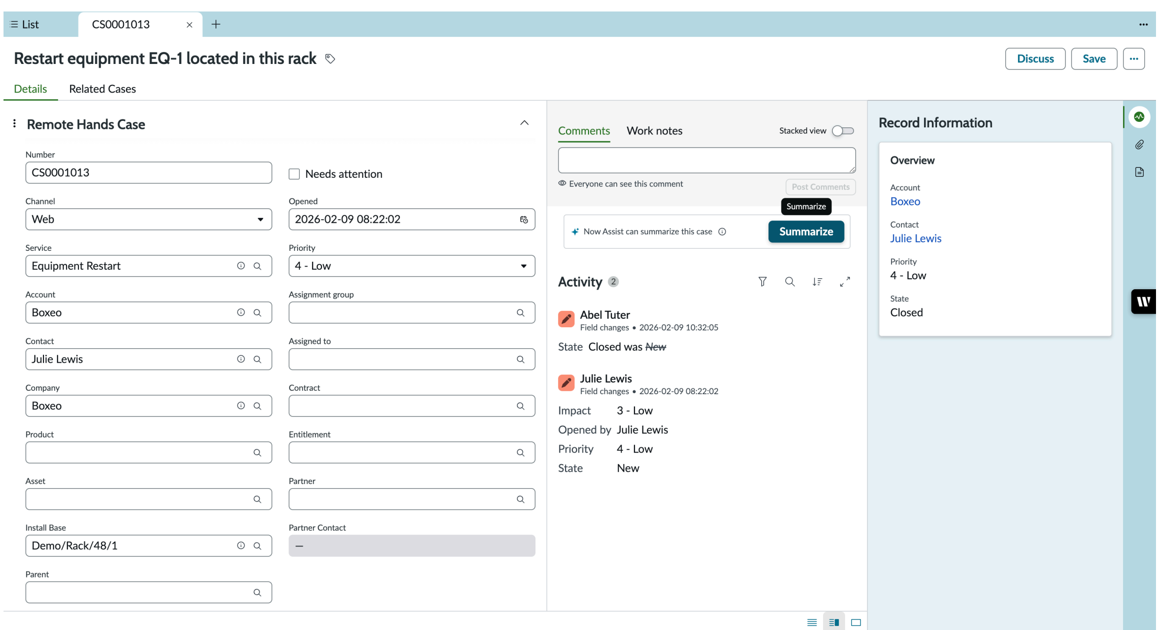
Now Assist panel in CSM/FSM Configurable Workspace

An agent can use the Now Assist panel in CSM/FSM Configurable Workspace.

This conversational interface enables an agent to request a service problem case summary and generate the service problem case resolution notes. For more information about the Now Assist panel, see Now Assist panel.

Now Assist in Remote Hands Request management application

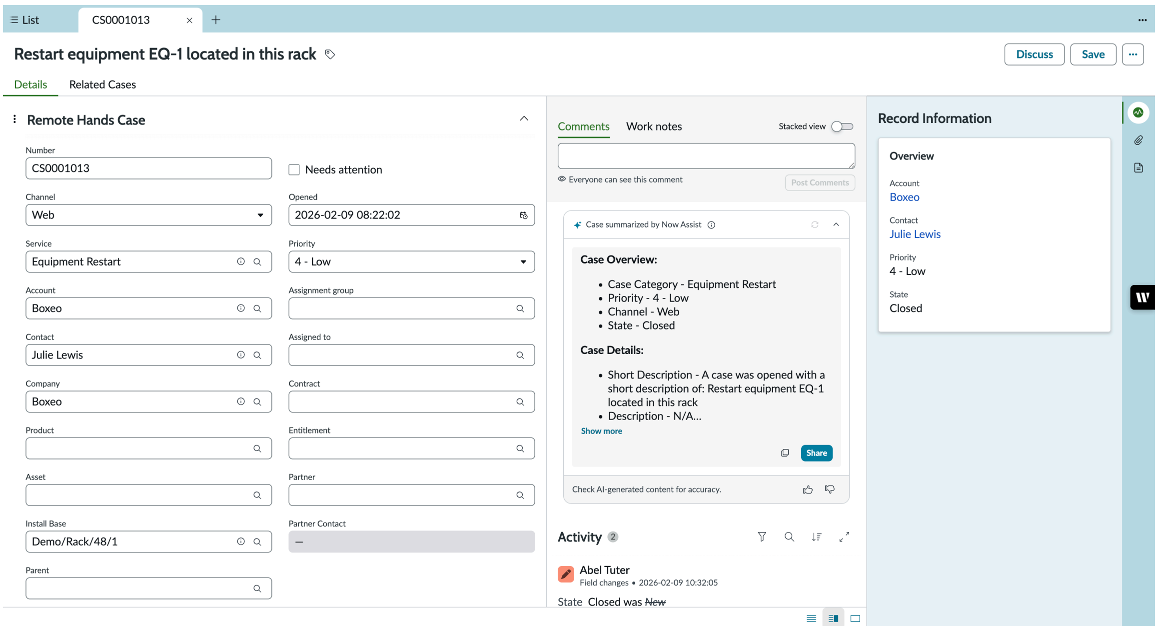
Remote Hands Request Summarization is an Now Assist capability that provides a contextual overview of a Remote Hands case by combining current case data with insights from similar historical cases. Users with the Remote Hands Agent role can generate a summarized view of a Remote Hands case by selecting the **Summarize** option from either the Remote Hands Case table or the CSM/FSM Configurable Workspace.



The comprehensive summary includes the following sections:

- Case Overview: The Case Overview section displays the key metadata retrieved from the Remote Hands Case table, including Case Category, Priority, Channel, and State.
- Case Details: The Case Details section displays the Short Description and Description fields from the Remote Hands case record, providing detailed context about the current request

- Related Case Summary: The Related Case Summary section is generated based on similar cases existing in the Remote Hands Case table.
- Case Reference: The Case Reference lists up to five similar cases found by the system
- Case Issue: The Case Issue displays the Short Description of the related case
- Case Resolution: The Case Resolution displays the Resolution Notes recorded in the related case



Related topics

Now Assist

Exploring Now Assist Admin

Supporting information for Now Assist for Telecommunications, Media and Technology (TMT)

Get a quick overview of the important information that is related to the Now Assist for Now Assist for Telecommunications, Media and Technology (TMT).

Supported versions

Now Assist for TMT is supported starting with Xanadu.

Supported user interfaces

Now Assist for TMT application includes the skills that are listed in the following table.

Now Assist for TMT supported interfaces

CSM/FSM Configurable Workspace	• Service problem case sentiment analysis • Comprehensive summary of linked records • Deadlock letter draft generation • Resolution notes generation for ADR

Now Assist for TMT supported interfaces (continued)

	• Service problem case summarization • Resolution notes generation • Test summarization • Knowledge generation • Account onboarding case summarization • Engagement record summarization • Touchpoint record summarization • Customer service summary • Customer play summarization • Internal play summarization • Success initiative summarization • Risk signal and issues summarization • Remote Hands Case Summary
Core UI	• Service problem case summarization • Test summarization • Knowledge generation • Account onboarding case summarization • Engagement record summarization • Touchpoint record summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Mapping assist • Risk signal and issues summarization • Remote Hands Case Summary

Application information

Activate the Now Assist for TMT (sn_tmt_gen_ai) store app to use the service problem case summarization skills and to generate case resolution notes.

This store app has the dependency on Customer Service Problem Management.

Activate the applications in the following order:

1. Customer Service Problem Management
2. Now Assist for TMT

For more information, see Configuring Now Assist for Telecommunications, Media and Technology (TMT).

Configuring Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that your agents can use the generative AI skills in the CSM/FSM Configurable Workspace and in Core UI.

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for TMT. For information needed to install the Now Assist plugins and configure generative AI skills, see Overview tab in Now Assist Admin.

TMT features and skills in the Now Assist Admin console

TMT features	Skills
ADR	• Service problem case sentiment analysis • Comprehensive summary of linked records • Deadlock letter draft generation • Resolution notes generation for ADR
Telecommunications Customer 360	Generate Telecom Customer 360 Insights
Service Problem Case	• Case summarization • Resolution notes generation • Test summarization • Knowledge generation • Customer service summary
Customer Success Management	• Account onboarding case summarization • Engagement summarization • Touchpoint summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Analyze metric trend • Risk signal and issues summarization • Lookup similar engagements • Draft risk closure notes • Renewal insight engine
Service Exchange	Transform mapping

TMT features and skills in the Now Assist Admin console (continued)

TMT features	Skills
Data Center	Remote Hands Case Summary

Note: The ServiceNow® large language model (Now LLM Service) is currently the only provider for this Now Assist application's skills.

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Skills** tab on the screen.
3. Activate and configure the skills for the Now Assist for TMT features.
   These features are grouped under the Customer workflow group. Each feature has its associated skills.
4. Select **TMT** under the **Customer** workflow group.
5. On the Now Assist skills for TMT page, select **Activate skill** for the skill that you would like to activate.
   The page for the skill that you activated opens with the General details section highlighted.
6. Review the inputs for the selected skill.

   The input table fields are read-only. For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).
7. After reviewing the inputs for the selected skill, select **Save and continue** to go to the next step.
   You can return to a previous step by using the **Back** button.
8. In the Define availability section, choose one of the following:
   - To enable the skill everywhere it is available, select **Skill is always available**.
   - To manually set the conditions for when the skill is available, select **Customize skill availability**.
9. After you configure the skill availability, select **Save and continue** to go to the next step.
10. Select where you would like to display the skill.
    - To display the skill on the Mobile Agent app, select **In-product**.
    - To display the skill in the Now Assist panel, select **Now Assist panel**.

      For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.
11. After you configure the display for the selected skill, select **Save and continue** to go to the next step.
12. Review your choices and select **Activate** to complete the configuration.

Result
Your skill is configured.

Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT)

Use inputs for each skill to configure how and when a skill is used.

Overview of Now Assist for TMT

Depending on the selected skill, you can configure inputs. These settings determine how a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a service problem case summary, resolution notes summary, customer service summary, and test summary.

Domain separation allows users to separate data, processes, and administrative tasks into logical groupings known as domains. Domain separation enables users to independently manage skill configurations, data visibility, and other settings within each domain. Domain separation is possible at the skill level and at the individual configuration level.

Domain separation is possible at the skill level and at the individual configuration level.

Enable security for Now Assist skills and flows through access control lists (ACLs) and user identities. For more information, see Configure ACLs for AI agents and agentic workflows.

To understand more about the ServiceNow domain separation, see Exploring domain separation.

Service Problem Case sentiment analysis skill

The Service Problem Case sentiment analysis skill uses the following table and field inputs to analyze the customer sentiment on a service problem case.

Inputs for the service problem case sentiment analysis skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt.admin]
Input fields	• Description • Short description • State • Issue severity • Additional comments • Work notes

Comprehensive summary of linked records skill

The comprehensive summary of linked records skill uses the following table and field inputs to generate the summary of linked records in an Alternative Dispute Resolution (ADR) case.

Related inputs for the comprehensive summary of linked records skill

Input	Description
Input table	ADR Complaint [sn_telco_adr_mgmt_complaint]
Input fields	Short description

Deadlock letter draft generation skill

The deadlock letter draft generation skill uses the following table and field inputs to generate a deadlock letter for an ADR case.

Inputs for the deadlock letter draft generation skill

Input	Description
Input table	ADR Complaint [sn_telco_adr_mgmt_complaint]
Input fields	ADR record sys_id

Resolution notes generation for ADR skill

The resolution notes generation for ADR skill uses the following table and field inputs to generate the resolution notes for an ADR case.

Related inputs for the deadlock letter draft generation skill

Input	Description
Input table	ADR Complaint [sn_telco_adr_mgmt_complaint]
Input fields	ADR record sys_id

Risk signal and issues summarization skill

The risk signal and issues summarization skill includes the inputs that identify the table and fields that are used when a risk signal and issues summary is generated.

Inputs for the risk signal and issues summarization skill

Input	Description
Input table	Risk signal and issues
Input fields	• Account Name • Priority • Description • Short description • State • Source record

Inputs for the risk signal and issues summarization skill (continued)

Input	Description
	• Category Name • Probability

Input for risk signal and issues summarization skill

Input	Description
Input table	Risk solution
Input fields	• Source record • Source table • impacted_record • impacted_table

Draft risk closure notes summarization skill

The draft risk closure notes summarization skill automatically generates closure notes and closes eligible risk signals at the end of each day based on the status of their associated risk solutions.

Inputs for the draft risk closure notes summarization skill

Input	Description
Input table	Risk signal and issues
Input fields	• Account Name • Priority • Description • Short description • State • Source record • Category Name • Probability

Customer service summary skill

The customer service summary skill helps user to get information on the customer service issues from their knowledge graph. You can configure the input in the following customer service summarization stages:

- General details
- Graph questionnaire

To add or modify the queries, see Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT).

- Customize prompt

  To customize the prompt, see Customize a skill in Now Assist for TMT.

- Define access
- Select display
- Review and activate

Inputs for the customer service summary skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt.admin]

Service problem case summarization skill

The service problem case summarization skill includes the inputs that identify the table and fields that are used when a service problem case summary is generated. You can configure the input in the following service problem case summarization stages:

- General details
- View input
- Customize prompt
- Define availability
- Select display
- Review and activate

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the service problem case summarization skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments • Diagnostic Task Fields: ◦ Description ◦ Short description ◦ Work notes

Inputs for the service problem case summarization skill (continued)

Input	Description
	◦ state ◦ sys id • Resolution Task Fields: ◦ Description ◦ Short description ◦ Work notes ◦ state
Input templates	• Verify • Diagnose • Repair • Test & Resolve • Close

Resolution notes generation skill

The resolution notes generation skill includes the inputs that identify the table and fields that are used when the resolution notes are generated for a service problem case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the resolution notes generation skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments

Test summarization skill

The test summarization skill includes the inputs that identify the table and fields that are used when a test summary is generated.

The following table lists the inputs that you can configure for the test summarization skill.

Inputs for test summarization skill

Input	Description
Input table	Test Run [sn_st_mgmt_test]
Input field	Name

Related input for test summarization skill

Input	Description
Input table	Test Measure [sn_st_mgmt_test_measure]
Input field	• Metric name • Metric description • Value • Rule violation

Knowledge article generation skill

The knowledge article generation skill includes the inputs that identify the table and fields that are used when the knowledge article draft is generated for a case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the knowledge article generation skill.

Related inputs for the knowledge article generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	• Short description • Description • Resolution notes • Work notes • Comments

Account onboarding case summarization skill

The account onboarding case summarization skill includes the inputs that identify the table and fields that are used when an account onboarding summary is generated. You can configure the input in the following account onboarding case stages:

- Form details
- Data capture
- Development

- Training
- Testing

Inputs for the account onboarding case summarization skill

Input	Description
Input table	Account Onboarding Case [sn_acct_lc_onb_case]
Input fields	• Service Exchange integration • Short description • Description • Go live date • Days remaining • Work notes • Additional comments
Stage - Data Capture	

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Task
Input field	• Short description • State • Days remaining • Type

Related input for account onboarding skill (continued)

Input	Description
	• Work notes • Additional comments

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

Engagement summarization skill

The engagement summarization skill includes the inputs that identify the table and fields that are used when an engagement summary is generated.

Inputs for the engagement summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_engagement]
Input fields	• State • Stage • Renewal date • Initial go-live date • Perceived health

Related input for engagement summarization skill

Input	Description
Input table	Risk and issue

Related input for engagement summarization skill (continued)

Input	Description
Input fields	• State • Due date • Probability

Related input for engagement summarization skill

Input	Description
Input table	Internal play
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success case
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success initiative
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success outcome
Input fields	• Progress • Base value • Current value • Target value

Touchpoint summarization skill

The touchpoint summarization skill includes the inputs that identify the table and fields that are used when a touchpoint summary is generated.

Inputs for the touchpoint summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_touchpoint]
Input fields	• Squad • Progress

Related input for touchpoint summarization skill

Input	Description
Input table	Meeting details
Input fields	• Conference details • Meeting type • Meeting start time • Meeting end time • Customer notes • Meeting notes • State

Customer play summarization skill

The customer play summarization skill includes the inputs that identify the table and fields that are used when a customer play summary is generated.

Inputs for the customer play summarization skill

Input	Description
Input table	Customer play
Input fields	• Engagement • Account • Progress • Days remaining • Squad • Contact • Short description

Inputs for the customer play summarization skill (continued)

Input	Description
	• Description • Product

Related input for customer play summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date

Related input for customer play summarization skill

Input	Description
Input table	Meeting details
Input fields	• State • Name • Meeting start time • Meeting end time

Internal play summarization skill

The internal play summarization skill includes the inputs that identify the table and fields that are used when an internal play summary is generated.

Inputs for the internal play summarization skill

Input	Description
Input table	Internal play
Input fields	• Engagement • Account • Progress • Squad • Contract • Short description

Inputs for the internal play summarization skill (continued)

Input	Description
	• Description • Product • Days remaining

Related input for internal play summarization skill

Input	Description
Input table	Internal play task
Input fields	• State • Short description • Description • Due date • Days remaining

Success initiative summarization skill

The success initiative summarization skill includes the inputs that identify the table and fields that are used when a success initiative summary is generated.

Inputs for the success initiative summarization skill

Input	Description
Input table	Success initiative
Input fields	• Primary success outcome • Account • Sold product name • Sold product number • Squad • Short description • Description • State • Contact • Days remaining

Related input for success initiative summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date • Days remaining

Lookup similar engagements skill

The Lookup similar engagements skill includes the inputs that identify the table and fields that are used when a product adoption roadmap is generated.

Inputs for the lookup similar engagements skill

Input	Description
Input table	Engagement [sn_acct_lc_engagement]
Input fields	• Phase table ○ Product usage ○ Product capability usage • Phase field (Activation status, Business criticality, Customer priority, Usage plan)

Remote Hands Case Summarization skill

Inputs for the Remote Hands Case Summarization skill

Input	Description
Input table	Remote Hands Case table (sn_remote_hands_case)
Input fields	• Remote Hands Case table • ○ Service ○ Priority ○ State ○ Channel ○ Short Description ○ Description

Banners in Now Assist for Telecommunications, Media and Technology (TMT)

Banners display information about generative AI skills and the form fields that are generated or predicted by those skills.

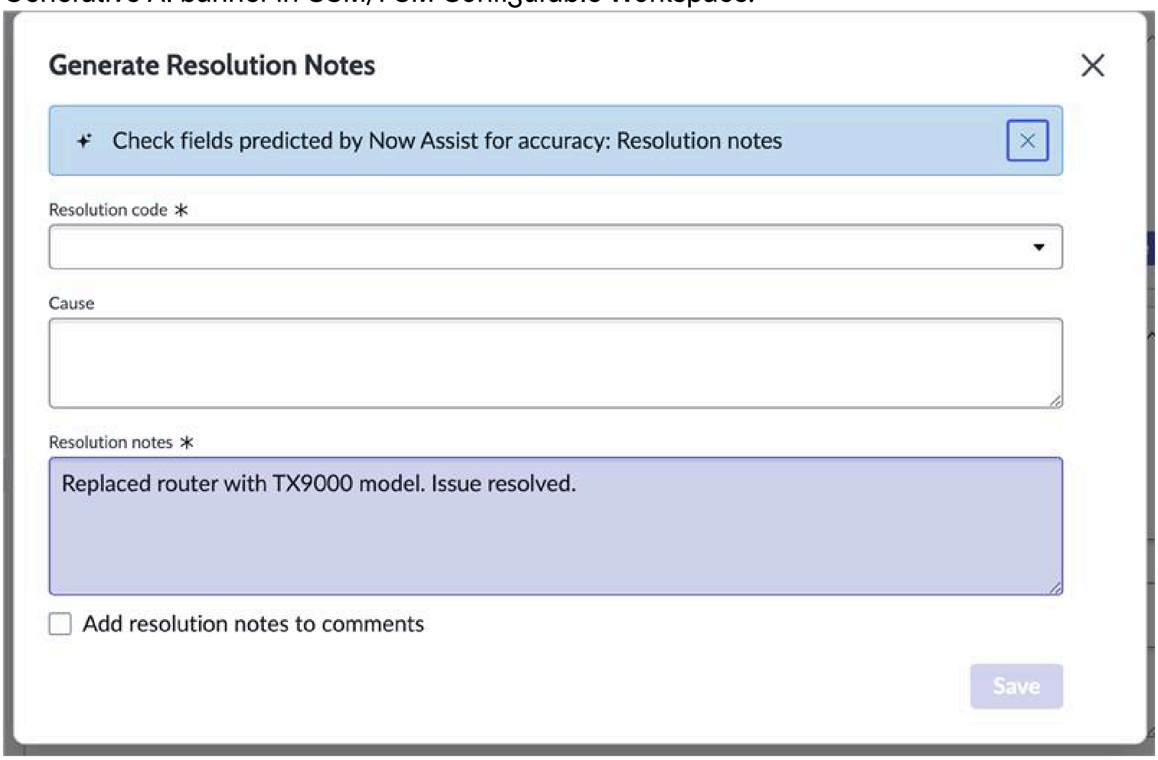
Overview of banners in Now Assist for TMT

The generative AI banner displays information about the fields on a form that are generated or predicted by the skills available with Now Assist for TMT. The messages that appear in the banner do the following:

- Alert agents when fields are being generated or predicted and when the process is complete.
- Remind agents to review the information in these fields.
- Inform agents if fields cannot be generated or predicted.

Messages also include links to the fields that are generated or predicted by Now Assist for TMT.

Generative AI banner in CSM/FSM Configurable Workspace.



Customize a skill in Now Assist for TMT

If you have the admin role, you can customize a Now Assist for Telecommunications, Media and Technology (TMT) skill so that agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.

Before you begin
Role required: admin

About this task
From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the account onboarding and service problem management, and then configure the prompt headers to include them in the general summary.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Customer** workflow group, select **TMT** to view the skills for the Now Assist for TMT features.
3. Activate and copy the Now Assist for TMT feature case summarization skill for customization.

   a. On the feature card that is associated with the skill that you would like to activate, select **View details**.

   b. In the All available skills section, locate the skill you would like to activate and select **Activate skill**.

      You can choose to make a copy of the skill before activating it.

   c. Select the More actions icon for the skill in the Active skills section, and create a copy that you can customize by selecting **Make a copy**.

      The copy that you make is listed in the Active skills section.

   d. Select the copied skill from the Active skills section to open it.
      A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the case summarization skill is activated.

4. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).

   a. Enter a name and description for the skill.

   b. Select **Save and continue** to go to the next step.

5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates for the skill.

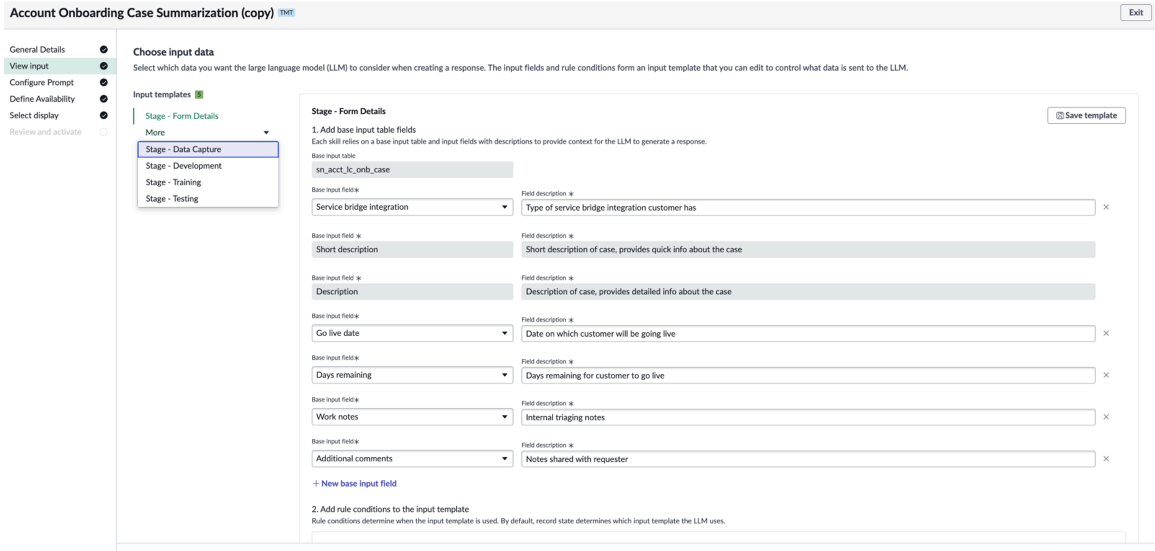
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

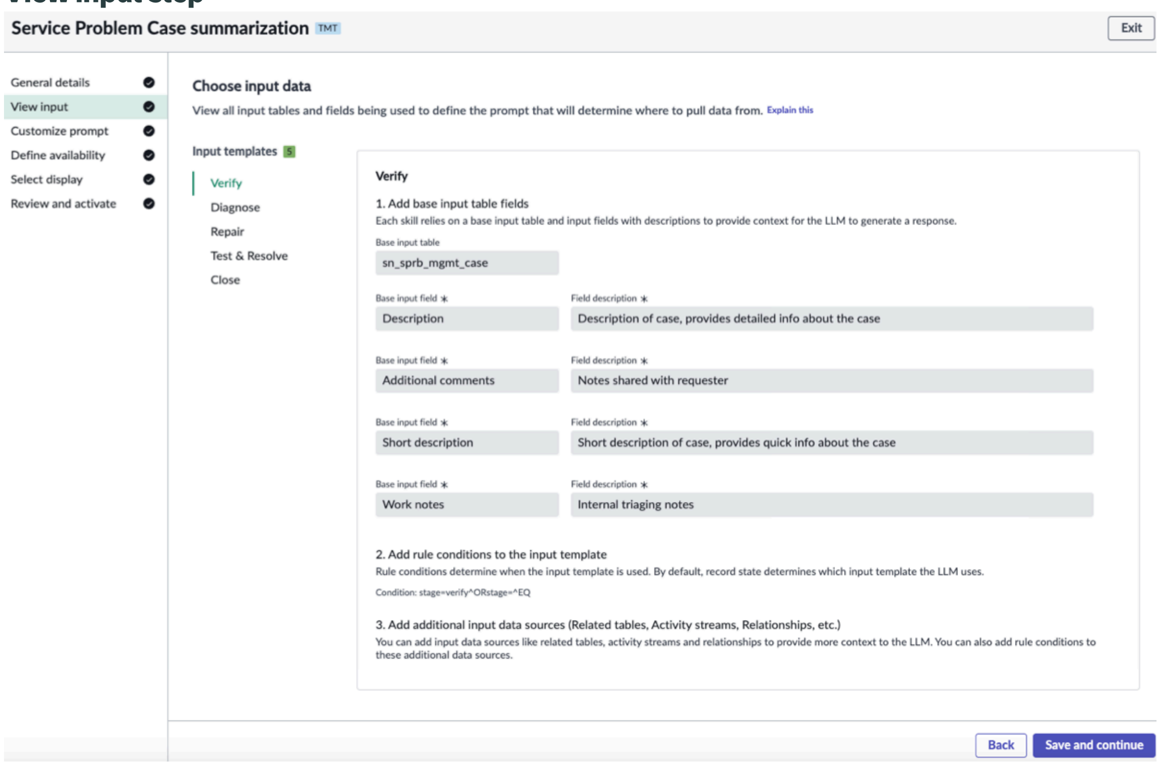
   a. For each input template, select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

View input step



View input step



The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.

Field	Description
Field description	Description of the base input field value. For example, `Short description of case, provides quick info about the issue.`

b. For each input template, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

c. For each input template, select **+New data source** to configure the additional related table and activity stream data, as needed.

Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

a. For each input template, select the prompt sections from the list of available sections to include in the generated summary.

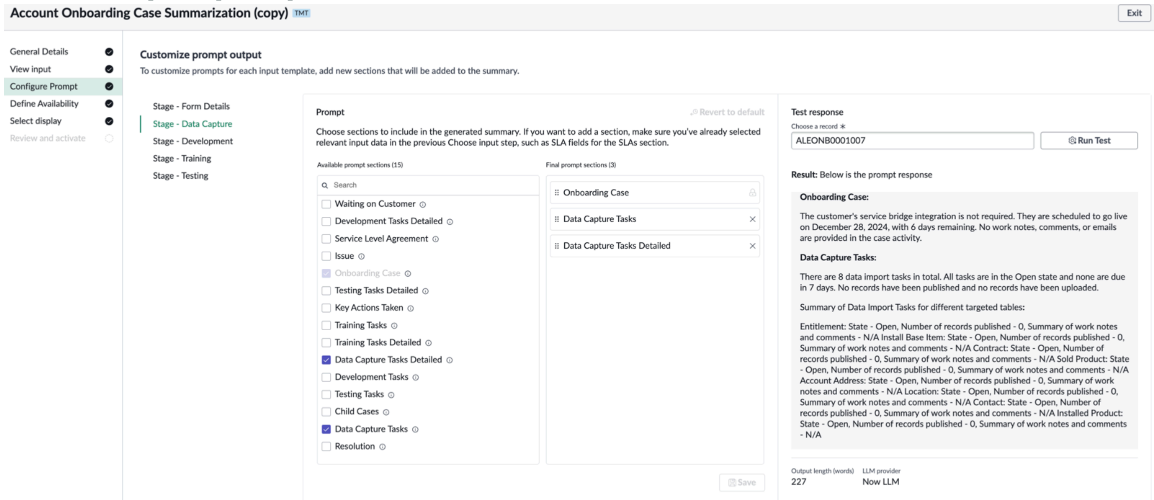
To add a section, you must configure the relevant input data prior to this step.

You can add the **Waiting on customer** prompt to cases only if the case has an **Awaiting info** state. Otherwise, adding this header to other states could cause the Now LLM Service to generate inaccurate or unreliable results.

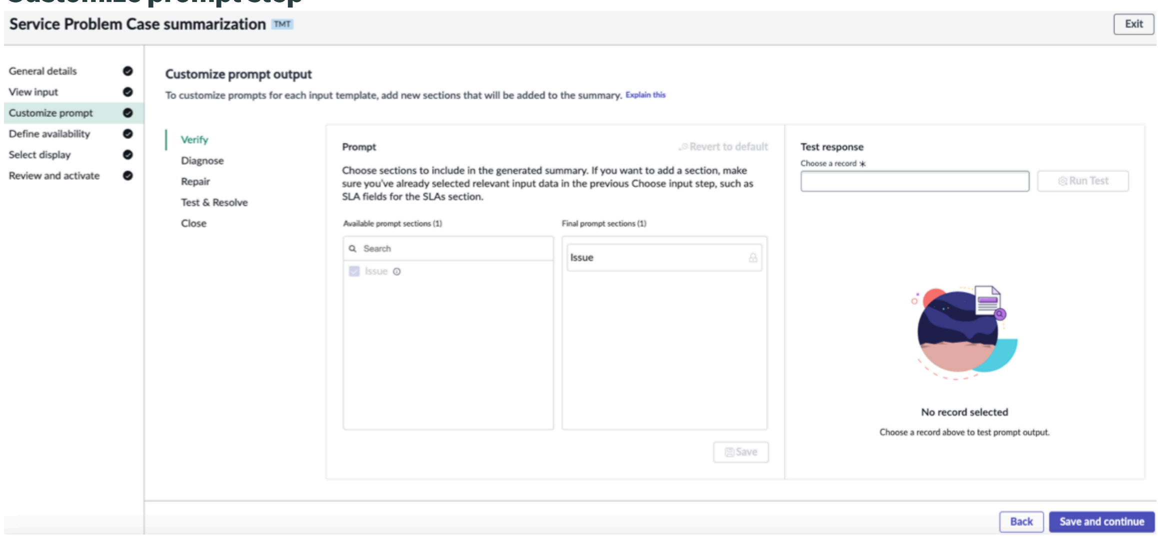
b. Select **Save** to continue to the test response.

c. Select a case record in the Test response section, and test the prompt response output format by selecting **Run Test**.

Customize prompt step



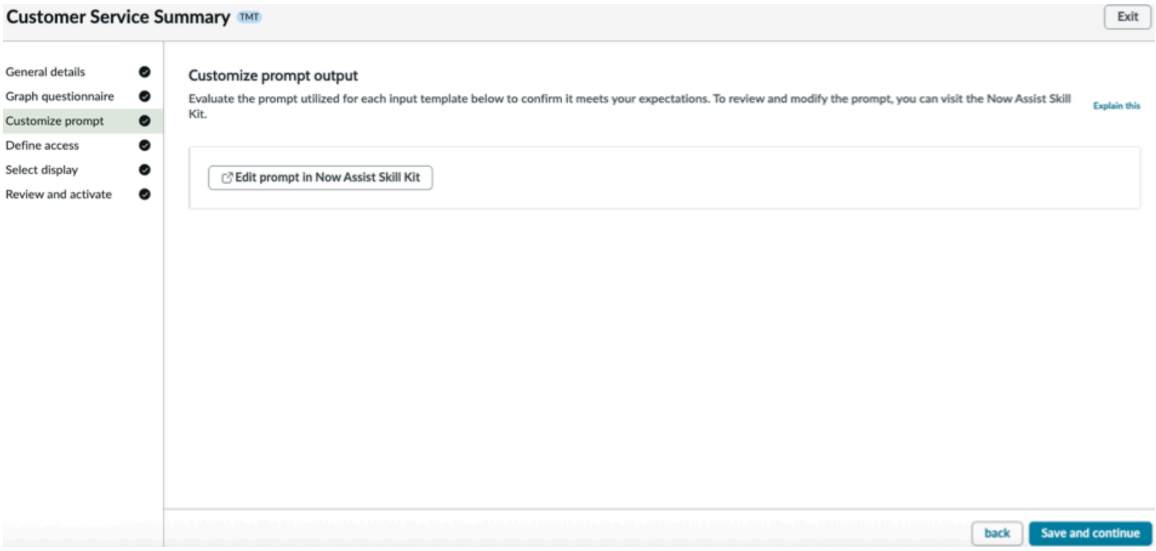
Customize prompt step



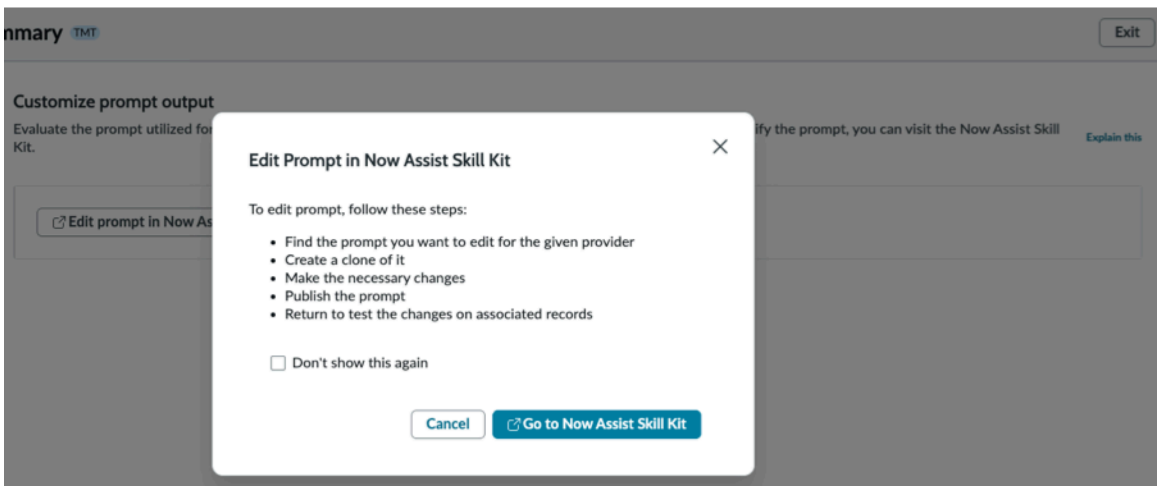
d. Select **Save and continue** to go to the next step.

7. Customize the prompt for customer service summary skill.

Review the prompt for each input template.



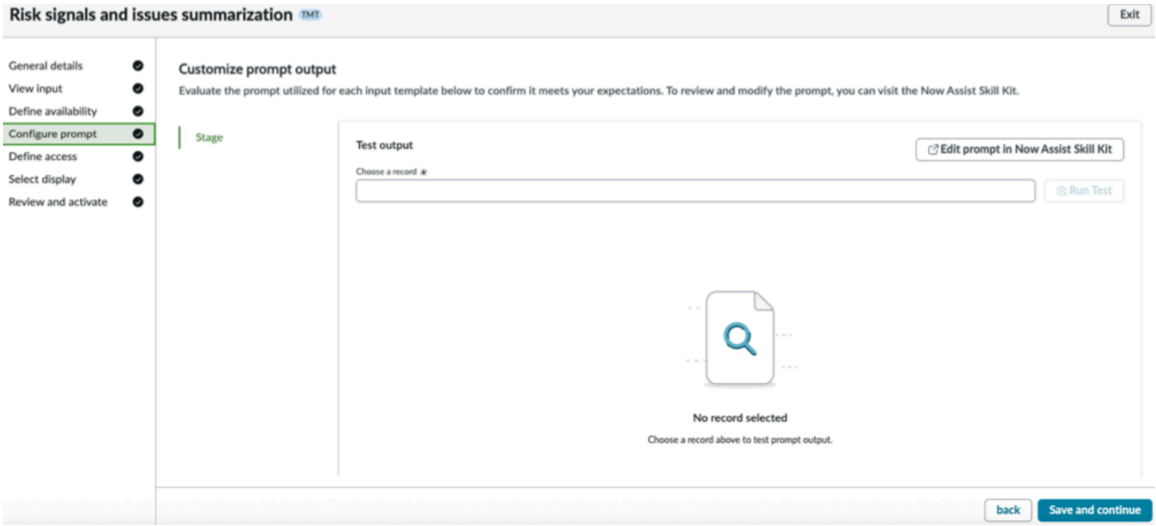
a. Select **Edit prompt in Now Assist Skill Kit** to visit Now Assist Skill Kit.



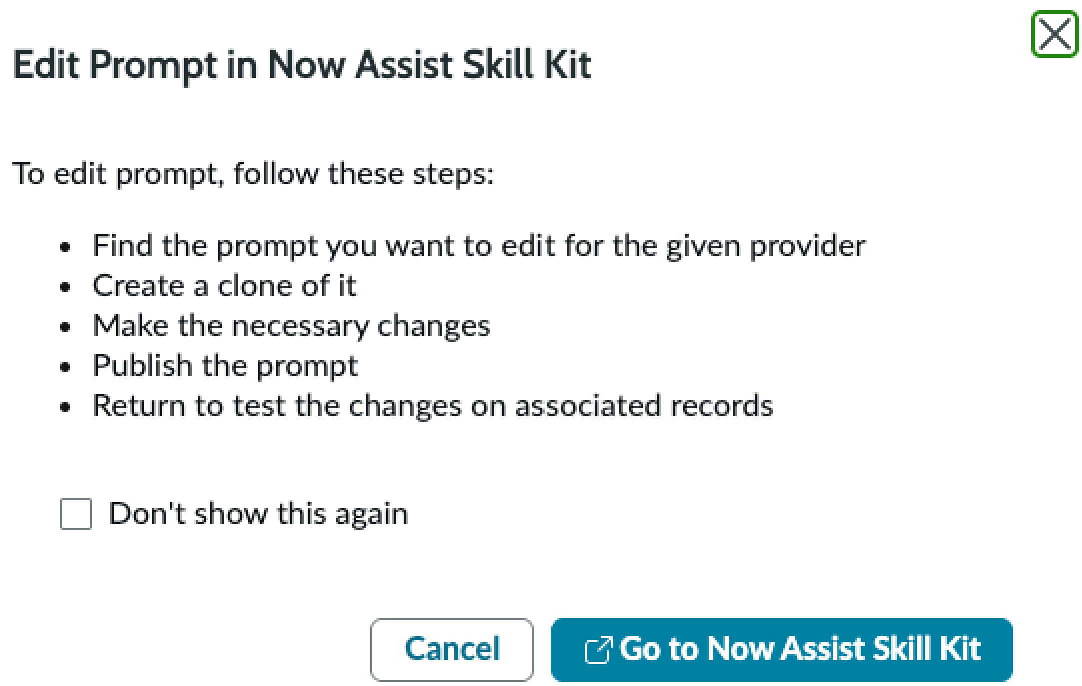
b. Select **Go to Now Assist Skill Kit** to review and modify the prompt.

8. Customize the prompt for risk signal and issues summary skill.

Review the prompt for each input template.



a. Select **Edit prompt in Now Assist Skill Kit** to visit Now Assist Skill Kit.



b. Select **Go to Now Assist Skill Kit** to review and modify the prompt.

9. Select **Save and continue** to go to the next step.
10. Define how the skill is available to your users.

    a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
    Selecting **Customize skill availability** displays a condition builder to filter the data further.

    b. Select **Save and continue** to go to the next step.

11. Configure where to display the case summarization.

a. Select either **In-product**, or **Now Assist panel**.

- **In-product**: When selected, the Now Assist skills are displayed on the forms and workspaces.

  For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

- **Now Assist panel**: When selected, the Now Assist skills are available in the Now Assist panel.

  If you don't see this option, you must activate the Now Assist panel. For more information, see Activate the Now Assist panel standard chat.

  For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

12. Review and activate the skill.
Review your choices and select **Activate** to complete the skill customization.
You can now select **Summarize** in a case to generate the case summary.

Configure Service Exchange Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that enterprise providers can use the Service Exchange Mapping Assist feature in the Core UI.

Before you begin
Role required: admin

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Features** and access the **Features** tab of the Now Assist Admin console.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Features** tab on the screen.
3. Select **Customer** and select **TMT** in the Select product drop down list.
4. On the Service Exchange feature card, select **View details**.
5. In the All available Service Exchange skills section, select **Turn on**.
   Your skill is configured and activated. Agents can now automatically generate transform mapping between the provider and consumer fields.

Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT)

Configure the graph questionnaire to add or modify the new queries to retrieve the knowledge graph data.

servicenow

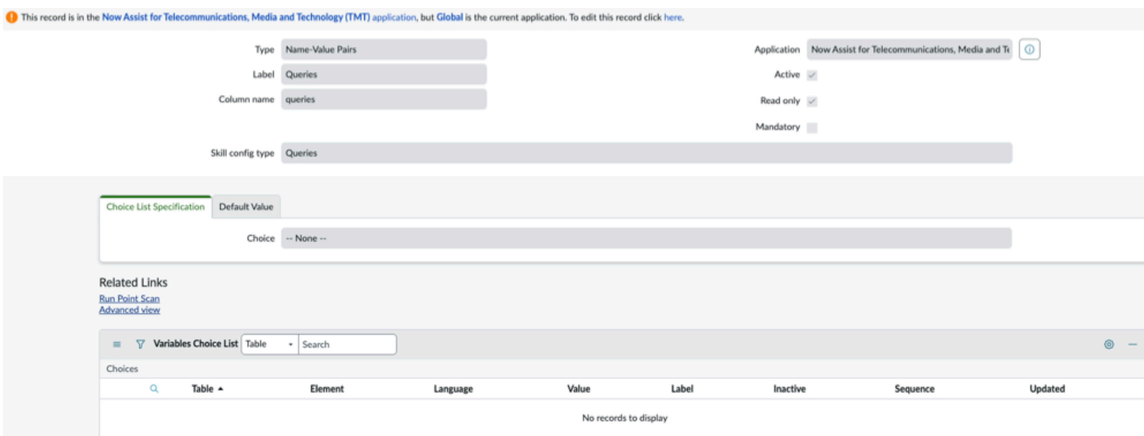
Before you begin
Role required: Admin

Procedure

1. Type `sn_nowassist_skill_config_var.LIST` in the **All** search filter.
2. Press enter.
3. Search for `Queries` in the **Column name**.
4. Open the record.
5. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.

6. Clear the **Read only** field.



Using agentic workflows in Now Assist for Telecommunications, Media and Technology (TMT)

Use the Now Assist for TMT agentic workflows to complete tasks autonomously.

Available agentic workflows for Now Assist for TMT AI agent collection

Agentic workflow name	Description	Available AI agents
Test and repair telecom service issues	The agentic workflow gets triggered when the service problem case is assigned to the case agent and the state of the case is Open or New. The customer raises a case on the service disruption. The service problem case (SPC) starts with the SPC number. This AI agent is designed to handle the service problem case requests that require	• Service problem manager AI agent • Customer payment status AI agent • Preliminary troubleshooter AI agent • On-demand service tester AI agent • Service repairer AI agent

Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
	troubleshooting, diagnostics, analysis, or resolution for a task (case), when an identifier or description for the task is given. It's also capable of retrieving relevant context and details related to the task given to them. AI agents perform their tasks to resolve the customer issue.	
Help remediate bill issues	The agentic workflow is designed to handle billing inquiry requests by analyzing current invoice usage, providing insights into high bill usage, and suggesting alternative plans based on customer usage patterns. For example, if a customer with a domestic mobile connection uses it internationally, they may incur extra charges; our bill analysis can identify such international usage and provide optimal plan to help manage costs.	• Billing account information collector AI agent • Recommended plans AI agent • Billing invoice data collector AI agent
Analyze network incidents	Assists customer agents in resolving a given incident. It helps customer agents to resolve network tickets by tracking it and creating an actionable task.	• Network ticket resolution AI agent • Ticket readiness AI agent • Network correlation monitor AI agent • Network ticket actionable steps generation AI agent • Network remediation generation AI agent
Analyze risks and recommend solutions	Retrieves applicable risks and proactively suggests solutions with minimal user intervention.	Success risk manager AI agent
Monitor engagement health	Monitors the health score trends for all active engagements and triggers risk signals when declined.	• Success trend AI agent • Success health monitor AI agent

Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
Support renewals and expansion	Assesses engagements due for renewal, analyzes trends, and recommends renewal strategies.	• Renewal analysis AI agent • Value realization assessor AI agent • Success insight AI agent
Trigger risk mitigation touchpoint	Automates the creating and scheduling of meetings for a specific user.	• Meeting draft creator AI agent • Draft meeting scheduler AI agent
Service Exchange onboarding	Assists the provider with the consumer registration process, including step-by-step guidance, error checks during registration, and support for resolving any errors.	• Registration Initiator AI agent • Registration Error Monitor AI agent
Customer voice quality issue resolution	Assists customer service representatives in resolving customer voice quality issues.	• Ticket creation AI agent • Customer interaction context gatherer AI agent • RADCOM ticket handling agent customer profile (External agent)
Squad resource identifier	Assists the customer success teams to quickly identify and connect with the right individuals to support success plays, initiatives, or critical escalations, ensuring faster and more effective collaboration across engagements.	User resource recommender AI agent
Product release email communication	Assist the customer to automatically draft, refine, and distribute the release announcement emails to designated recipients by retrieving the most recent product release information.	Email communication manager AI agent

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

Important: By default, all agentic workflows and AI agent records are read only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Customer Service Problem Management agentic workflows

The Customer Service Problem Management agentic workflows are used to resolve broadband, internet issues, and incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task, and handle the billing inquiry case requests.

Preliminary troubleshooter agentic workflow

Use the preliminary troubleshooter agentic workflow to resolve broadband and internet issues.

Test and repair telecom service issues overview

Resolve the customer issues such as internet or broadband issues using a team of agents in the preliminary troubleshooter agentic workflow.This agentic workflow processes task requests that require payment status, contextual information from similar cases and Knowledge Base articles. This workflow runs autonomously in the background without any user interaction.

The Preliminary troubleshooter agentic workflow supports these tables:

- Incident
- Change request
- Domain order
- Order task
- Service problem case

Role required: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

To modify the Preliminary troubleshooter agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Preliminary troubleshooter agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Preliminary troubleshooter**.

To create a new agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Start manual test**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Service test and repair agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Task information collector AI Agent V2	Collects the task information and validates the task.
Customer payment status AI Agent V2	Checks for outstanding bill payments.
Preliminary troubleshooter AI Agent V2	• AI agent designed to ask questions that are fetched from the structured question generator. • Activate the structured question generator skill to generate the questions from the skill. • Summarizes the resolution plan by checking the similar cases and Knowledge Base articles.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection service test and repair agentic workflow

Use the service test and repair agentic workflow to run the test groups that are mapped to a task.

Service test and repair overview

Resolve the customer issues using a team of agents in the service test and repair agentic workflow. This agentic workflow processes task requests that require to run the test groups that are mapped to a task and create repair tasks for the failed test runs. This workflow also updates the consolidated summary in work notes and runs autonomously in the background without any user interaction.

The service test and repair agentic workflow supports these tables:

- Incident
- Change request
- Domain order
- Order task
- Service problem case

Role required: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

To modify the service test and repair agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Service test and repair agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Service test and repair**.

To create an agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Start manual test**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Service test and repair agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Task information collector AI Agent V2	Collects task information and validates the given task.
On demand service tester AI Agent V2	Creates a diagnostic task based on the inventory specifications for a service problem case and execute a test groups.
Service repair AI agent V2	Creates the repair task for the test runs.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection Help remediate bill issues agentic workflow

Use the Help remediate bill issues agentic workflow to handle the billing inquiry case requests and recommend better plans based on the customer usage.

Help remediate bill issues agentic workflow overview

The Help remediate bill issue agentic workflow uses a team of AI agents that support the resolution of customer issues. It can handle task requests to retrieve the account details, current invoices, and past invoices. It analyzes the data to identify reasons for high bill usage and recommends better plans based on customer usage patterns.

Role required: sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

To modify the Help remediate bill issues agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Help remediate bill issues agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Help remediate bill issues**.

To create a new use case, see Create an agentic workflow.

Application dependency

The Help remediate bill issues agentic workflow has the following dependencies:

- Case Management for Invoice operations (com.sn_csm_invoice)
- Product offering recommendations

To configure the spoke selector, see Configure the spoke selector for external systems.

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Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the agentic workflow, see Manually test the execution of an agentic workflow.

AI agents used in the Help remediate bill issues agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Billing account information collector AI agent	This AI agent is designed to handle billing inquiries by following a structured approach. It retrieves the billing inquiry case details and obtains the billing account details using the account number. The agent is intended for use by ServiceNow agents for getting the billing account number.
Recommended plans AI agent	This AI agent is designed to facilitate the generation and confirmation of service plan recommendations through a structured approach. It follows these instructions: 1. Generates a recommended plan. 2. Shows the recommended plan to the user for confirmation. 3. Verifies whether an email is associated with the customer account. 4. Triggers the email notification agent to send the recommended plan details to the user.
Billing invoice data collector AI agent	This AI agent collects the billing invoice data like account details, invoice history, and invoice details.

Configure the spoke selector for external systems

Configure the spoke selector for Aria to enable the configuration and execution of billing requests.

Before you begin
Role required: admin

About this task

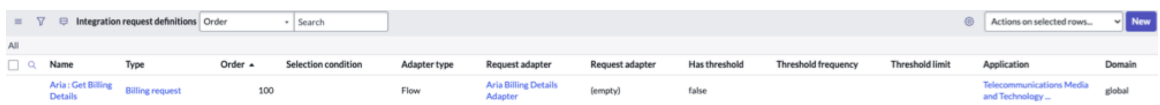
The spoke selector application provides a common framework that enables the configuration and execution of integration requests. It operates by selecting the matching implementations based on the configured input parameters for each request.

Procedure

1. Navigate to **All** > **Spoke selector** > **Request type**.
2. Select **Billing request**.

   The billing request is configured with a request definition that invokes Aria APIs. This demo implementation serves as a reference for configuring a new request definition that retrieves billing-related data from a third-party system for billing requests.
3. Create the Integration request definitions.

   By giving an appropriate value for **Order** or by defining the **Selection condition** the new request definition that fetches the billing-related data is triggered.
4. To create Integration request definitions, navigate to **All** > **Spoke selector** > **Request definition**.
5. In the Integration request definitions screen, select **New** in the header section.

6. On the form, fill in the fields.

Integration request type form

Field	Description
Name	Name of the integration request type.
Type	Billing request selection is made as the integration request type.
Description	Brief description of the request definition.
Order	Request definition is executed in the least order value.
Adapter type	Flow
Request adapter	Name of the Flow configured to fetch the records for the respective configuration type. **Note:** The sys_hub_flow record with the correct flow inputs, flow outputs, and flow snapshots.
Application	Store application details.
Domain	Global
Condition	Condition to trigger the request adapter.

The following parameters must be included in the request for the Get Account Details Request for Aria API request adapter:

```
{"api_name":"get_acct_details","request_body":{"client_acct_id"
:"FT0010001"}}
```

The following parameters must be included in the response for the Get Account Details Response for Aria API request adapter:

```
{"status_code":"1","status_reason":"","response_body":{"master_
plan_info_list":{"48477095":"Business Internet +
           Cellphone PI0001061"},"company_name":"Flash
 Telecom","acct_no":"27045400"}}
```

The following parameters must be included in the request for the Get Invoice History Request for Aria API request adapter:

```
{"api_name":"get_invoice_history","request_body":{"acct_no":"27
045400"}}
```

The following parameters must be included in the response for the Get Invoice History Response for Aria API request adapter:

```
{"status_code":"1","status_reason":"","response_body":{"invoice
s":
[{"amount":135.7,"invoice_no":254547358,"due_date":"2024-11-
30","outstanding_amount":135.7,"usage_bill_from":"2024-10-01","
usage_bill_thru":"2024-10-31"},
{"amount":190.26,"invoice_no":254547359,"due_date":"2024-12-
31","outstanding_amount":190.26,"usage_bill_from":"2024-11-01",
"usage_bill_thru":"2024-11-30"},
{"amount":172.95,"invoice_no":254547360,"due_date":"2025-01-
31","outstanding_amount":172.95,"usage_bill_from":"2024-12-01",
"usage_bill_thru":"2024-12-31"},
{"amount":437.07,"invoice_no":254547361,"due_date":"2025-02-
28","outstanding_amount":0,"usage_bill_from":"2025-01-01","usag
e_bill_thru":"2025-01-31"}]}}
```

The following parameters must be included in the request for the Get Invoice Details Request for Aria API request adapter:

```
{"api_name":"get_invoice_details","request_body":{"acct_no":"27
045400","invoice_no":"254547361"}}
```

The following parameters must be included in the response for the Get Invoice Details Response for Aria API request adapter:

```
{"status_code":"1","status_reason":"","response_body":{"line_it
ems":
[{"usage_type_no":10058138,"amount":0,"service_name":"Mobile
 Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (10 gigabytes @
$0)"},{"usage_type_no":10058138,"amount":14.35,"service_name":"
Mobile Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (18.847 gigabytes
@
 $1)"},{"usage_type_no":10058140,"amount":255.73,"service_name"
:"International Roaming Calls from
```

```
EU","sold_product_number":"PI0001065","service_no":11197966,"de
scription":"International Roaming Calls from
EU (93 minutes @
 $2.75)"},{"usage_type_no":10058144,"amount":0.5,"service_name"
:"Domestic
Minutes","sold_product_number":"PI0001065","service_no":1119656
8,"description":"Domestic Minutes (9.91
minutes @
 $.05)"},{"usage_type_no":10058146,"amount":11.75,"service_name
":"International Calls to
Asia","sold_product_number":"PI0001065","service_no":11196570,"
description":"International Calls to Asia (6.56
minutes @ $1.79)"}]}}
```


7. Select **Save**.

Result

Once the condition is set and the request condition matched, the defined flow executes and the records for the configuration are fetched from the external provider that you selected, into your ServiceNow instance.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection analyze network incidents agentic workflow

Use the Analyze network incidents agentic workflow to resolve incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task.

Analyze network incidents agentic workflow overview

Resolve the customer issues using a team of AI agents in the Analyze network incidents agentic workflow. It assists the customer agents in resolving a given incident.

Role required: sn_tmt_agentic_ai.sn_noc_incident_user

To modify the Analyze network incidents agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note: You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.sn_noc_incident_user

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Analyze network incidents agentic workflow has the following plugin dependencies:

- Customer service with service management (sn_cs_sm)
- Customer service (sn_customerservice)
- Customer service problem management
- Telecommunications alarm management open API (sn_ind_tmf642)
- Field service management for telecommunications (sn_fsmt)
- Major issue management

Analyze network incidents agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Analyze network incidents**.

To create a new use case, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Analyze network incidents agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Network ticket resolution AI agent	AI agent capable of providing overall incident and alert summary. It's also capable of searching the knowledge base for relevant articles to provide resolutions if available.
Ticket readiness AI agent	AI agent capable of predicting the incident fields like category, subcategory, priority, description, short description, and estimated time to resolve the incident using GAF on historic incident data. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).

AI agent	AI agent role
Network correlation monitor AI agent	AI agent capable of identifying the impacted accounts and services and correlating cases opened in the last 15 minutes that could be impacted because of the incident, provide the list to the customers for review, and associate it to the incident. It's also capable of notifying customers about the outages based on human confirmation by creating service problem cases and linking child cases if any.
Network ticket actionable steps generation AI agent	AI agent capable of generating actionable resolution steps for incoming incident using the Group Action Framework (GAF) and modifies the steps according to the human feedback. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).
Network remediation generation AI agent	AI agent capable of consuming resolution steps for an incident and converting them to one of the following task types: • Incident Task • Work Order • Change Request

Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT)

Activate Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

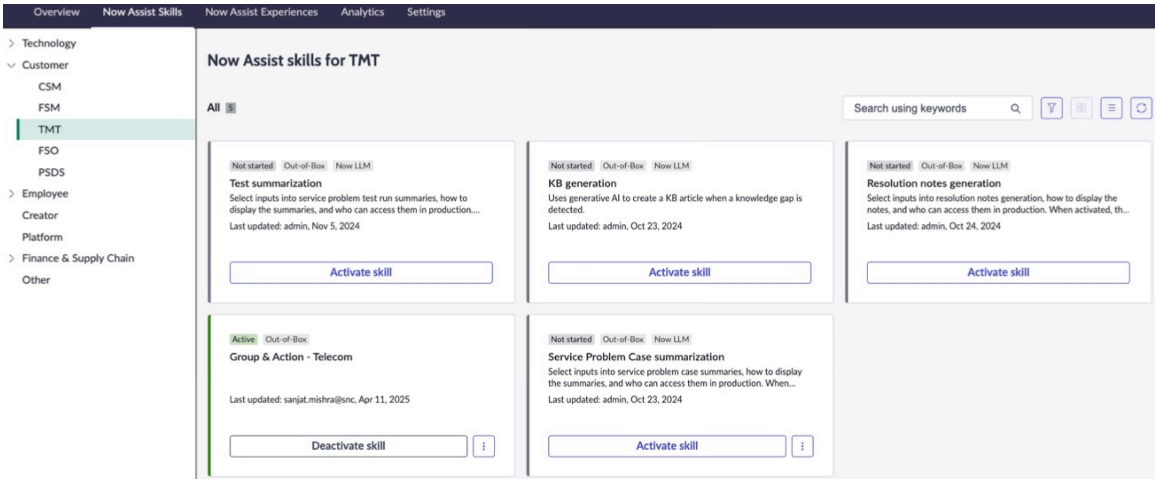
Before you begin

The scope must be a Telecommunications, Media, and Technology AI agent collection.

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Telecom, select **Activate skill**.



3. **Optional:** On the form, select **Edit** to change the values.
4. Select **Save and continue**.
5. On the **Review and activate** tab, select **Done**.

Result
GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Telecommunications, Media and Technology (TMT) Customer voice quality issue resolution agentic workflow

Use this agentic workflow to resolve customer voice quality issues.

Customer voice quality issue resolution agentic workflow overview

This agentic workflow gathers customer information, collects the subscriber experience profile from RADCOM, and creates a service problem case. By integrating RADCOM's AI agents with ServiceNow AI agents, wireless providers can link subscriber details with key service performance metrics. This integration enables swift resolution of service issues and reduces churn rates.

This agentic workflow is triggered when a new interaction is created in the CSM Interaction record under the following conditions:

- Type: Phone or Chat
- Category: Network

Note: The Customer voice quality issue resolution agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Role masking

Required role: sn_sprb_mgmt.agent

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Customer voice quality issue resolution agentic workflow has the following dependencies:

- Customer Service (sn_customerservice)
- Customer Service Problem Management z(sn_sprb_mgmt)

Configure the Customer voice quality issue resolution agentic workflow

This agentic workflow requires a third-party agent, the RADCOM ticket handling agent, to retrieve the customer experience profile. To use the third-party agent, you must create an external agent by following the steps listed in the Create an external AI agent section.

Test the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Customer voice quality issue resolution**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Customer voice quality issue resolution agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

AI agents and their role in the Customer voice quality issue resolution agentic workflow

AI agent	AI agent role
Customer interaction context gatherer AI agent	• Retrieves and analyzes customer interaction data. • Provides detailed contextual information regarding customer communication patterns, product usage history, and relevant troubleshooting information.
RADCOM ticket handling AI agent (external agent)	Retrieves subscriber profile including network usage patterns, service quality metrics, and customer behavior insights.
Ticket creation AI agent	• Identifies duplicate records, determines case type, and verifies documents. • Checks existing cases and creates a new case.

Customer Success Management agentic workflows

The Customer Success agentic workflows are used to collect health data, monitor the engagement health score, analyze risks, support renewals, and schedule touchpoint meetings.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection monitor engagement health agentic workflow

Use the Monitor engagement health agentic workflow to monitor the health score of engagements and their associated metric data trends, and generate risk signals when a decline is detected.

Monitor engagement health agentic workflow overview

Customer success managers can monitor the health score of up to 10 active engagements and summarize the health trend for the past 6 weeks. Each metric used to calculate the health score is monitored, and if a declining pattern is detected, a risk signal or a risk occurrence (for an existing risk signal) is generated. A summary indicating the number of risk signals created and the health score range is generated. The Monitor engagement health agentic workflow is triggered weekly based on a predefined schedule and the results are displayed in the Now Assist panel.

You can view the risk signals and occurrences that have been created by navigating to the Risk signals page. For risks created using the agentic workflow, the following field values are displayed:

- Category: Health declined
- Creation method: AI generated

Note:

- To run the agentic workflow as a scheduled job, you must activate the Monitor engagement health flow. See Activate a flow for details.
- The agentic workflow monitors only the engagements for which **AI Health Monitor** flag has been enabled. Each customer success manager can enable a maximum of 10 engagements. For instructions on enabling this flag, see Create an engagement.
- By default, the health score of each individual metric is monitored. If you want to monitor only the overall health score across all engagements, update the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* system property by following these steps:
    - Navigate to **All** and enter *sys_properties.LIST* in the search field.
    - Select the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* property.
    - Set the Value field to **false**. When this property is inactive, the agentic workflow will monitor the overall health score instead of the individual metrics.
- For any new or existing health definitions, you must specify the **Context** for the **Data source** to indicate how the color banding range will be applied. Based on the **Context**, you can define different color banding ranges that can be used for the health score. For example, you can configure different values for the same **Data source** as follows:
    - **Data source 1**
        - Data source: Daily collection of NPS
        - Context: Health Metric Configuration: Daily collection of NPS (Global)
        - Min: 80
        - Max: 100
        - Color: Green
        - Category: Good
    - **Data source 2**
        - Data source: Daily collection of NPS
        - Context: Daily collection of NPS for (Customer X)
        - Min: 0
        - Max: 60
        - Color: Red
        - Category: Poor

  For more details on configuring the color banding table, see Set up the color banding table.

AI agents used in the Monitor engagement health agentic workflow

The Monitor engagement health agentic workflow uses specific AI agents to monitor the engagements, analyze the health trend, and generate a health score.

AI agents and their role in the Monitor engagement health agentic workflow

AI agent	AI agent role
Success trend analyst AI agent	Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies. Provides clear

AI agents and their role in the Monitor engagement health agentic workflow (continued)

AI agent	AI agent role
	actionable insights enabling AI agents to make informed decisions and take appropriate actions.
Success health monitor AI agent	Retrieves data for all active engagements, identifies trends, and creates a risk signal if a declining pattern is detected.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection recommend risk signal solutions agentic workflow

Use the Analyze risk and recommend solutions agentic workflow to monitor and mitigate risks in customer engagements with minimal user intervention.

Recommend risk signal solutions agentic workflow overview

Note: Before you use this agentic workflow, you must activate the AI Agents for Customer Success Management plugin (com.sn_cust_succ_ai_agent).

Use the Recommend risk signal solutions agentic workflow to:

- Provide real-time risk analysis and generate detailed reports.
- Identify common solutions and provide proactive recommendations.

Customer success managers can collaborate with customer success squad members to monitor risks, perform real-time risk analysis, generate detailed reports with proactive recommendations. This helps prevent escalations, improve customer retention, and enhance service quality. The agentic workflow can be used to assess and offer solutions for a risk signal.

You can trigger this workflow in two ways:

1. **Recommend solutions button**
   a. Navigate to **All** > **CSM/FSM Configurable Workspace** and select the **List** icon.
   b. From the **Customer Success** menu, select **All Risks and issues** and open a risk signal record.
   c. Select the **Recommend solutions** button in the risk record
2. Navigate to the Now Assist panel panel in the **CSM/FSM Configurable Workspace** and specify a risk number to be resolved.

For information on how risks are generated, see Define risk criteria.

Configure the Recommend risk signal solutions agentic workflow

Before you use the agentic workflow, do the following:

- Configure the Engagement risk solutions decision table to map risk categories to Customer Success definitions. The Recommend risk signal solutions agentic workflow uses these mappings to identify and recommend success plays for an unaddressed risk signal. The decision table contains the following columns:
  - Rank: The order in which the conditions are evaluated.
  - Category: The category of the risk signal, from the Risk Signal and Issues table.
  - Customer Success Definition: The Customer Success definition to use for the risk category. Each Customer Success definition specifies the subflow to

execute when the solution option is selected. See Create a customer success definition record for details. You can map multiple definitions to the same category.

	Conditions	results
Rank	Category Risk (Risk Signal and Issue ▸ Category)	Customer Success Definition Customer Success Definition [sn_acct_lc_definition_record]
1	Reputational Risk	Enable Business Velocity (AI Agent)
2	Low Adoption	Enable Business Velocity (AI Agent)
3	Low Adoption	Get to Green Play (AI Agent)
4	Internal Play	Get to Green Play (AI Agent)

See Using decision tables for details on configuring the decision table.

- The solution subflow must contain the following input:

  Risk system ID: This is the system ID of the risk signal for which the solution is being created.

- The solution subflow must return the following output:

  Generated record: An array of objects representing the solution records to be associated with the risk signal. Each object must contain the table name and sys_id of the solution record.

You can define additional inputs as needed, such as Due Date, to be used in subflow steps or to override default values.

Note: If you're using an earlier version of this agentic workflow, see KB2764672 for steps on how to update your decision table configuration.

AI agents used in the Recommend risk signal solutions agentic workflow

The Analyze risks and recommend solutions agentic workflow uses specific AI agents to retrieve all unaddressed risks and recommend solutions.

AI agents and their role in the Recommend risk signal solutions agentic workflow

AI agent	AI agent role
Success risk manager AI agent	Retrieves the unaddressed risk signal and provides solution recommendations.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection trigger risk mitigation touchpoint

Use the Trigger risk mitigation touchpoint agentic workflow to schedule and edit a touchpoint meeting for a specific user.

Trigger risk mitigation touchpoint agentic workflow overview

The agentic workflow enables customer success agents to optimize meeting schedules within the customer success workflow by creating and managing meetings. It create and manage meetings based on key details such as invitees, agenda, meeting type, and scheduling preferences. With this agentic workflow, customer success managers can:

- Take timely and contextual action.
- Create a meeting with all required details.
- Schedule draft meetings without manual coordination.

In the Trigger risk mitigation touchpoint agentic workflow, when the risk record's probability is very high or occurred, the customer success agent is assigned to that risk receives a Now Assist panel notification. From the risk record, the agentic workflow automates the creation of meeting and schedules the meeting.

To modify the Trigger risk mitigation touchpoint agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note: You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Role masking

Required role: sn_acct_lc.customer_success_agent

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Trigger risk mitigation touchpoint agentic workflow

This workflow does the following:

Note: Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
   - Generic Prompt (Azure OpenAI Chat)
   - Generic Prompt (Now LLM Service)
   - Generic Prompt Vertex AI (Google Cloud Chat Completion)
   - Generic Prompt (Amazon Bedrock Chat Completions)

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Trigger risk mitigation touchpoint**.

To create an agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Trigger risk mitigation touchpoint agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in the Trigger risk mitigation touchpoint agentic workflow

AI agent	AI agent role
Meeting draft creator AI agent	AI agent automates draft creation of meetings using context and history of the risk record. **Note:** The AI agent creates meeting inside a touchpoint.
Draft meeting scheduler AI agent	AI agent automates virtual meeting scheduling by collecting invite and details provided from the customer success agent.

Now Assist for Telecommunications, Media and Technology (TMT) Support renewals and expansion

Assess engagements and contracts due for renewal, analyze trends, and recommend renewal strategies.

Support renewals and expansion agentic workflow overview

The Support renewals and expansion agentic workflow enables customer success agents to assess the health, value, and product adoption of an engagement or contract. It provides data-driven insights and renewal play recommendations and enables customer success agents to manage multiple customer engagements efficiently. The workflow uses the Renewal Insight Engine skill to evaluate individual product metrics, health score trends, usage trends, and value scores at both the engagement and contract level, providing more granular insights than the earlier decision table-based approach. See Renewal insight engine skillfor details.

Customer success managers can use the Support renewals and expansion agentic workflow to:

- Track how much value has been delivered since onboarding.
- Measure progress against goals and service delivery metrics.
- Retrieve and calculate health and adoption scores.
- Analyze trends to support informed adoption and engagement decisions.
- Generate renewal likelihood assessments and expansion potential at the engagement and contract level.
- Receive up to three recommended actions, each with a specific play type, target product, priority, and reasoning.

Note: The Support renewals and expansion agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Configure the Support renewals and expansion agentic workflow

Before you use the agentic workflow, you must do the following:

- Activate the Renewal Insight Engine skill in Now Assist for TMT. The skill is inactive by default and must be manually activated. See Renewal insight engine skill for details.
- Configure the following fields in the Renewal analysis AI agent:

- Engagement adoption source sysID
- Contract adoption source sysID
- Health source sysID
- Time period (in days)
- Metric aggregation type

Note: The source sysIDs must be configured correctly in the Data Context Engine as follows:

- Health: Source and context table must be set to Engagement.
- Engagement: Source table must be set to Sold Products and the context table must be set to Engagement.
- Contract: Source table must be set to Sold Products and the context table must be set to Contract.

For more details on configuring the data sources, see Configure the Data context engine.

Support renewals and expansion agentic workflow

Note: Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
   - Generic Prompt (Azure OpenAI Chat)
   - Generic Prompt (Now LLM)
   - Generic Prompt Vertex AI (Google Cloud Chat Completion)
   - Generic Prompt (Amazon Bedrock Chat Completions)

When a contract is due to expire in 90 days, the customer success manager receives a notification and the Support renewals and expansion workflow is automatically triggered. The customer success manager can monitor the progress in the Now Assist panel and select one of the following scans:

- Value
- Health
- Usage
- Value & Health
- Health & Usage
- Value & Usage
- Value & Usage & Health

When the workflow is completed, two reports are generated for the engagement and the associated contract (that is due to expire in 90 days) with the following details:

- Renewal likelihood
- Expansion potential

- Recommended actions
- Adoption trend
- Health trend
- Value score

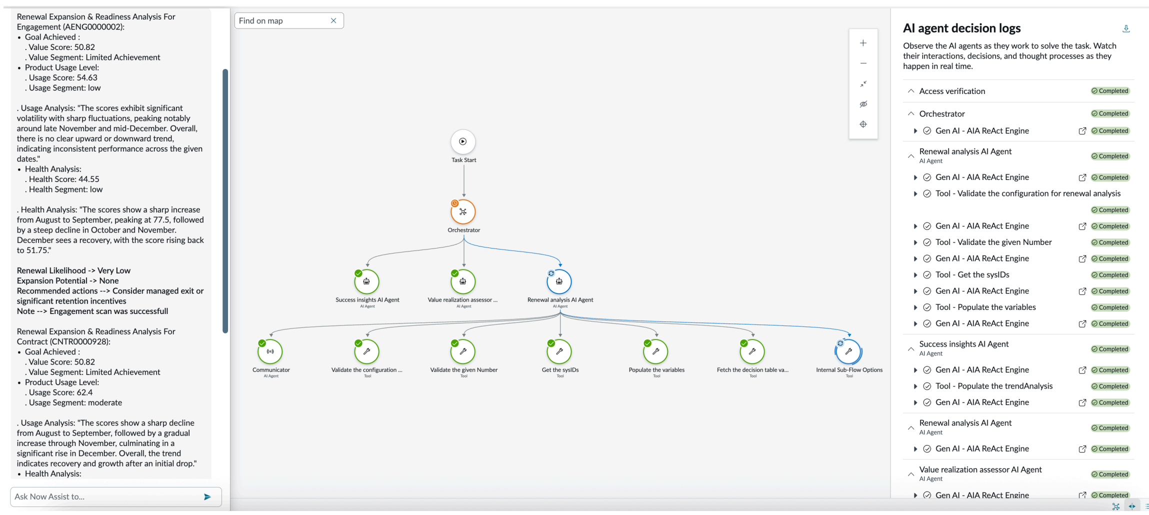
You can then select the appropriate renewal play based on the report.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Support renewals and expansion**.

To test the use case, see Manually test the execution of an agentic workflow.



AI agents used in the Support renewals and expansion agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

AI agents and their role in the Support renewals and expansion agentic workflow

AI agent	AI agent role
Renewal analysis AI agent	Analyzes renewal possibilities and triggers appropriate renewal flows based on assessment results.
Value realization assessor AI agent	Analyzes value realized by tracking service metrics and customer goal achievement over time.
Success insight AI agent	Populates score data and delivers trend analysis to support informed decisions.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection Squad resource identifier agentic workflow

Use a squad resource identifier agentic workflow to identify and recommend internal experts based on record under consideration, skill set, region, and real-time availability.

Squad resource identifier agentic workflow overview

The agentic workflow assists the customer success teams to quickly identify and connect with the right individuals to support success plays, initiatives, or critical escalations, ensuring faster and more effective collaboration across engagements.

The Squad resource identifier agentic workflow supports these tables:

- Touchpoint (sn_acct_lc_touchpoint)
- Account Onboarding Case (sn_acct_lc_onb_case)
- Success Task (sn_acct_lc_success_task)
- Engagement (sn_acct_lc_engagement)
- Implementation Record (sn_acct_lc_implementation_record)
- Customer Play (sn_acct_lc_success_case)
- Success Initiative (sn_acct_lc_success_initiative)
- Internal Play (sn_acct_lc_internal_play)
- Internal Play Task (sn_acct_lc_internal_play_task)
- Risk Signal and Issue (sn_acct_lc_risk_signal_issue)
- Onboarding Task (sn_ti_core_task)
- Data Import Task (sn_ti_core_imp_task)

Role required: sn_acct_lc.customer_success_agent and sn_acct_lc.agent

To configure the Squad resource identifier agentic workflow, see Squad Resource Identifier AI Workflow: Setup and Configuration Guide.

To modify the Squad resource identifier agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Important: In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Assign customer success role

The squad members assigned through the squad resource identifier workflow aren't automatically granted customer success roles. An administrator must manually assign the appropriate role to enable record access.

To assign customer success roles to users using the ServiceNow AI Platform user administration feature, see Assign a role to a user.

Squad resource identifier agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Squad Resource Identifier**.

To create a use case, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agent used in the Squad resource identifier agentic workflow

The following AI agent is used to execute the instructions for the agentic workflow.

AI agent and their role in the Squad resource identifier agentic workflow

AI agent	AI agent role
User resource recommender AI agent	Analyzes user data to identify the most relevant candidates, ranks them by priority, and automatically populates the input record with top-performing users.

To create an AI agent, see Create an AI agent.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection Product release email communication agentic workflow

Use the product release email communication agentic workflow to automatically draft, refine, and distribute the release announcement emails to designated recipients by retrieving the most recent product release information.

Prerequisites

To access the agentic workflow and product release content generator skill, install the plugin AI Agents for Customer Success Management (sn_cust_succ_ai_ag) in your instance.

Important: In the Now Assist skills page, make sure to Activate the product release content generator skill to trigger the agentic workflow. See Activate a skill for more details.

Product release email communication agentic workflow overview

The agentic workflow automatically drafts, refine, and publish release announcement emails to the multiple customers regarding the product changes and features adoption. The agentic workflow invokes the AI agent to fetch the latest released product information and creates a draft email. With this agentic workflow a customer can:

- Timely communicate customers about product changes, enhancements, new feature releases, and feature adoption.
- Identify the stakeholders, ensures consistent messaging, and streamline distribution.
- Focus on driving adoption and customer value instead of repetitive communication tasks.

This agentic workflow is delivered as part of the out-of-the-box (OOB) product offering and is preconfigured to operate with the Digital Product Release (DPR) application. This enables customers to get started quickly using the default setup. However, the workflow is designed with flexibility in mind and isn't limited to DPR. Organizations using alternative release management or related systems can seamlessly adopt this capability by integrating their existing applications with minimal customization. That ensures the workflow can be adapted to diverse system landscapes and specific business requirements.

When the DPR (sn_dpr_model_release) record moves to the completed state, the agentic workflow triggers automatically. For more information about DPR, see Digital Product Release.

To modify the Product release email communication agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

The CSM can trigger this agentic workflow manually only for assigned product releases.

The customer success manager can access this agentic workflow with these roles: sn_acct_lc.customer_success_agent and sn_dpr_model.release_user.

Product release email communication agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Product Release Email Communication**.

To create a new use case, see Create an agentic workflow.

AI agent used in the Product release email communication

The following AI agent is used to execute the instructions for the agentic workflow.

AI agent and the role in the Product release email communication agentic workflow

AI agent	AI agent role
Email communication manager AI agent	AI agent automates product release communications by retrieving the latest updates, generating personalized email drafts, and also giving CSMs the capability to edit the subject, introduction, and closing information in the email before sending it out. The agent handles the complete workflow from draft creation to delivery accurately, timely, and appropriately toned messages reach the recipients with minimal manual effort. The AI agent is invoked only when the product release is marked completed by release manager.

To create an AI agent, see Create an AI agent.

Service Exchange onboarding agentic workflows

Use the Service Exchange onboarding agentic workflow to register your consumers in Service Exchange.

Service Exchange onboarding agentic workflow overview

The Service Exchange onboarding agentic workflow helps providers register a consumer user in Service Exchange. It also helps identify any issues during consumer registration and helps you resolve those problems.

To modify the Service Exchange onboarding agentic workflow, you must duplicate the workflow and adjust the settings according to your requirements. For more information, see Duplicate an agentic workflow.

You can initiate the onboarding workflow from the Now Assist panel by entering the prompt `start onboarding`. For more information on the Now Assist panel, see Now Assist panel.

Access the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select *`Service Exchange`* **Onboarding**.

To create an agentic workflow, see Create an agentic workflow.

Test the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.
3. Select the agentic workflow and version, and select **Start test**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents and their role in the Service Exchange onboarding agentic workflow

The following AI agents are used to execute the instructions for the Service Exchange onboarding agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in Service Exchange onboarding agentic workflow

AI agent	AI agent role
Registration Initiator	This AI agent assists in initiating the registration process and managing the early stages of the process.
Registration Error Monitor	This AI agent assists users with a summary of the Service Exchange errors, enabling them to make informed decisions and take the appropriate actions.
Registration Monitor	This AI agent monitors registration life cycle events, validates registration status, and evaluates settings record creation. It posts concise success or failure updates to the registration task work notes to ensure clear visibility and accountability. **Note:** To use this agent, you must enable the **When registration moves to WIP** trigger. For more information about triggers, see Add a trigger to an AI agent.

Using Now Assist for Telecommunications, Media and Technology (TMT)

If you have an agent role, you can summarize service problem cases, technology product support cases, product inventory, account onboarding cases, touchpoints, engagements, internal plays, customer plays, success initiatives, and automate transforms with the Now Assist for TMT application.

Summarize the linked records using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a comprehensive summary of the service problem case records that you have linked on the Alternative Dispute Resolution (ADR) case. Quickly understand case details linked to a customer complaint using the comprehensive summary of linked records skill in the Now Assist for TMT application.

Before you begin

Role required: sn_telco_adr_mgmt.manager

About this task

The comprehensive summary of linked records skill provides you with a summary of the service problem cases that are linked to the customer dispute. You can use this skill to generate the **Key findings** field information in the Investigate stage in the ADR case creation.

The service problem case summarization skill is available in CSM/FSM Configurable Workspace. In CSM/FSM Configurable Workspace, you can use the ADR Complaint summary by Now Assist component to generate a summary. This component appears on the Analyze linked facts card in the Investigate stage of the ADR case record.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Alternative Dispute Resolution** > **All**.
2. Open the ADR case record that you're working on.
3. Select Investigate stage.
4. On the Analyze linked facts activity, in the ADR Complaint summary by Now Assists component, select **Summarize**.
   The ADR Complaint summary by Now Assists component appears and generates the summary.

   Note: Generating and displaying the summary may take several seconds.

5. **Optional:** After you're finished summarizing the key findings, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the comprehensive summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and

Option	Procedure
	stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the comprehensive summary information for another purpose, such as pasting into an email.
View the information about the case summary	To check some details about the summary, select the more info icon ( ).

6. Review the summary, and then select **Share to key findings**.
7. Select **Save to key findings**, to add the summary in the **Key findings** field.

What to do next

Complete the remaining steps to execute the ADR case record. To learn more, see Create an Alternative Dispute Resolution case.

Generate a deadlock letter using Now Assist for TMT

Generate a deadlock letter for Alternative Dispute Resolution (ADR) case. Quickly create the details of the deadlock letter by using the deadlock letter draft generation skill in the Now Assist for TMT application.

Before you begin

Role required: sn_telco_adr_mgmt.manager

About this task

The deadlock letter draft generation skill provides you with the details of the deadlock letter. This skill collects the inputs from the ADR case. If the customer doesn't agree with the ADR case resolution, then you can use this skill to generate the deadlock letter and share with the customer.

The deadlock letter draft generation skill is available in the CSM/FSM Configurable Workspace.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Alternative Dispute Resolution** > **All**.
2. Open the ADR case that you're working on.
3. Select Resolution stage.
4. In the Generate deadlock letter activity, navigate to the **Customer correspondence content** field.
5. Select the Now Assist icon ( ).
   The Now Assist component appears and generates the deadlock letter details.

   Note: Generating and displaying the details may take several seconds.

6. **Optional:** After you're finished summarizing the key findings, manage the results.

Option	Procedure
Provide feedback for the summary	○ If you think that the details of the deadlock letter were helpful, select the helpful icon ( ). ○ If you think that the deadlock letter wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary detail and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the details of the deadlock letter for another purpose, such as pasting into an email.
View the information about the case summary	To check some details about the deadlock letter, select the more info icon ( ).

7. Review the details, and then select **Insert** to add the generated content into the **Customer correspondence content** field.
   The details generated by Now Assist appear in the **Customer correspondence content** field.

What to do next

Complete the remaining steps to execute the ADR case record. To learn more, see Create an Alternative Dispute Resolution case.

Generate resolution notes for ADR case

Generate the resolution notes for an Alternative Dispute Resolution (ADR) case by using the resolution notes generation for ADR skill in the Now Assist for TMT application.

Before you begin

Role required: sn_telco_adr_mgmt.manager

About this task

The resolution notes generation for ADR skill enables you to generate resolution for the customer dispute in the ADR case record. You can propose this resolution to the customer and get the customer feedback.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Alternative Dispute Resolution** > **All**.
2. Open the ADR case that you're working on.
3. Select Resolution stage.
4. In the Propose resolution plan activity, navigate to the **Resolution notes** field.
5. Select the Now Assist icon ( ).
   The Now Assist component appears and displays the resolution plan.

Note: Generating and displaying the details may take several seconds.

6. **Optional:** After you're finished summarizing the key findings, manage the results.

Option	Procedure
Provide feedback for the summary	◦ If you think that the resolution plan was helpful, select the helpful icon ( ). ◦ If you think that the resolution plan wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the resolution plan for another purpose, such as pasting into an email.
View the information about the case summa ry	To check some details about the resolution plan, select the more info icon ( ).

7. Select **Insert** to add the generated content to the **Resolution notes** field.

What to do next

Complete the remaining steps to execute the ADR case record. To learn more, see Create an Alternative Dispute Resolution case.

Analyze the sentiment of a service problem case using Now Assist for TMT

Generates the requester's sentiment and the reasoning behind it on the complaint cases in the Now Assist for TMT application. Make informed decisions on complaint cases based on sentiment to link the cases on the Alternative Dispute Resolution (ADR) case record.

Before you begin

Role required: sn_telco_adr_mgmt.manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Alternative Dispute Resolution** > **All**.
2. Open the ADR case that you are working on.
3. Select Investigate stage.
4. On the Lookup record history activity, under the Relevant record section, navigate to the complaint cases.
5. Select the information icon ( ).
   The Customer sentiment component appears and provides an explanation for why that sentiment was given.

The Customer Sentiment component shows the assigned sentiment and explains why that sentiment was given.

Note: Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished analyzing the sentiment, manage the results.

Option	Procedure
Provide feedback for the summary	◦ If you think that the sentiment information was helpful, select the helpful icon ( ). ◦ If you think that the sentiment information wasn’t helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated sentiment infor mation and stores it in the generative AI logs (sys_generative_ai_log_list.do).

What to do next

Complete the remaining steps to execute the ADR case record. To learn more, see Create an Alternative Dispute Resolution case.

Summarize a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the service problem case record. Quickly understand the case context by using the service problem case summarization skill in the Now Assist for TMT application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The service problem case summarization skill provides you with a concise summary of a service problem case, including the issue, actions taken, and resolution details. With this skill, you can do the following tasks:

- Generate an initial summary of a service problem case so that you can understand the service problem case context.
- Summarize all the work that has been done on a service problem case.

The service problem case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Service Problem Case summary by Now Assist component to generate a summary. This component appears below the Case highlights card.
- In Core UI, you select the **Summarize** button on the service problem case record to generate a summary.

The service problem case summarization skill checks the service problem case record to determine if there is enough information available to create a summary:

- When an agent opens the service problem case record
- When an agent refreshes the service problem case record page

If there is enough data, the Service Problem Case summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The service problem case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Service Problem Case summary by Now Assist component, select **Summarize**.
   The Service Problem Case summary by Now Assist component appears below the Case highlights card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing a service problem case, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the service problem case summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the service problem case summary informa

Option	Procedure
	tion for another purpose, such as pasting into an email.
View the information about the case summary	To check some details about the summary, select the more info icon (ⓘ).

Generate resolution notes for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the resolution notes for a service problem case by using the resolution notes generation skill in the Now Assist for TMT application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

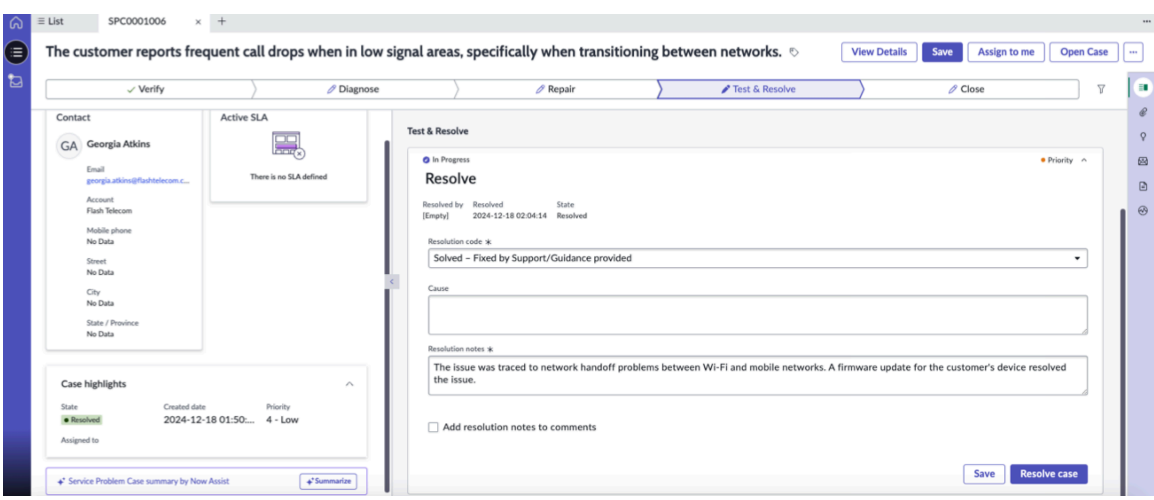
You can also propose the resolution to the customer, and then add the resolution information to the service problem case record. Generating resolution notes may help you wrap up cases faster and provide information about the service problem case resolution to other agents who might encounter similar issues.

You can also generate resolution information on demand from the Now Assist panel.

Note: The resolution notes generation skill requires a minimum of 50 words in the service problem case record to generate the resolution notes.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. Select **Test & Resolve** > **Resolve**.
4. Navigate to the Resolution notes field in the resolve activity.



5. Select the Now Assist icon ✦.
   Now Assist icon ✦ generates a recommended text that is based on the context of the case.
6. Select **Insert** to add the generated content into the resolution notes field.

7. **Optional:** Review the generated content and select **Refine** to modify the content.
   You get the option to either elaborate or shorten the content as needed.
8. **Optional:** If you want to add the resolution information to the service problem case activity stream, select the **Add resolution notes to comments** check box.
   Selecting this check box makes the resolution notes available to anyone who can view the service problem case activity stream.
9. Select **Save**.

Result

- The system populates the fields in the Closure Information section of the case record with the information from the Generate Resolution Notes modal.
- The case moves to the Resolved state.
- The resolution is proposed to the customer.

Generate a knowledge article for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the knowledge articles for resolved and closed cases within the CSM Configurable Workspace and classic environment with Now Assist.

Before you begin

To generate a knowledge article for a case, the case must be in the resolved and closed state, and must not already have a knowledge article linked to it.

Install the Knowledge Management Advanced plugin to use the Knowledge Centered Service (KCS) template when you're generating knowledge articles. For more information, see Activate the Knowledge Management Advanced plugin.

Make sure that your administrator enables Now Assist experience on the Create Article page to ensure that the following knowledge base generation criteria is configured:

- The knowledge skills are installed.
- In the Now Assist Admin console, ensure that the following criteria are in place:
  - Specify the table record and input fields.
  - Specify the conditions for the skill availability from the list of attributes.
  - Display the knowledge base generation feature In-product and specify the Now Assist panel.
- Configure **Create Article** to apply the supported template; For example, Standard and KCS article HTML.
- Currently, only the Create Article experience is available.

Role required: agent

About this task

In CSM Configurable Workspace and classic environment, you can generate the knowledge article information for a case by selecting **Create Knowledge** on the case record. This UI action displays the Use AI to draft this article modal. By using this modal, you can choose to write the article yourself or draft an article with Now Assist and review and edit the knowledge article text.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Open a case that is assigned to you.
   The case record status should be either resolved or closed.
3. Create the article by selecting **Create Knowledge** from the UI actions for the case record.

   Note:

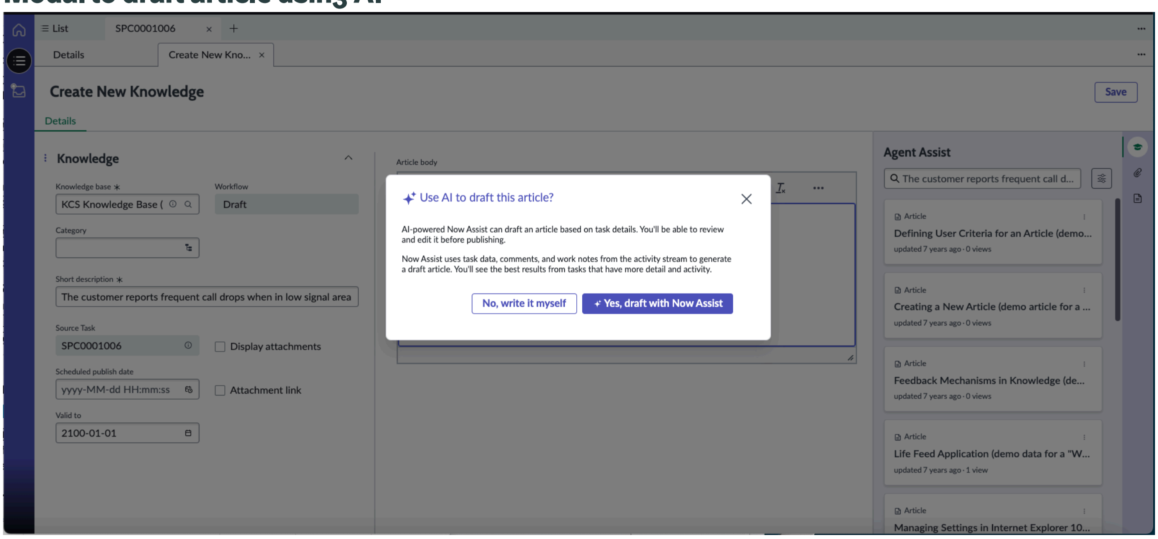
   The **Create Knowledge** UI action is only visible when a case doesn't have an existing knowledge article that is associated with it.

4. In the Create article modal, select a knowledge base and an Article template, if displayed.

   Note: If no options are displayed, the default template selected by your administrator in the Now Assist Admin console is used.

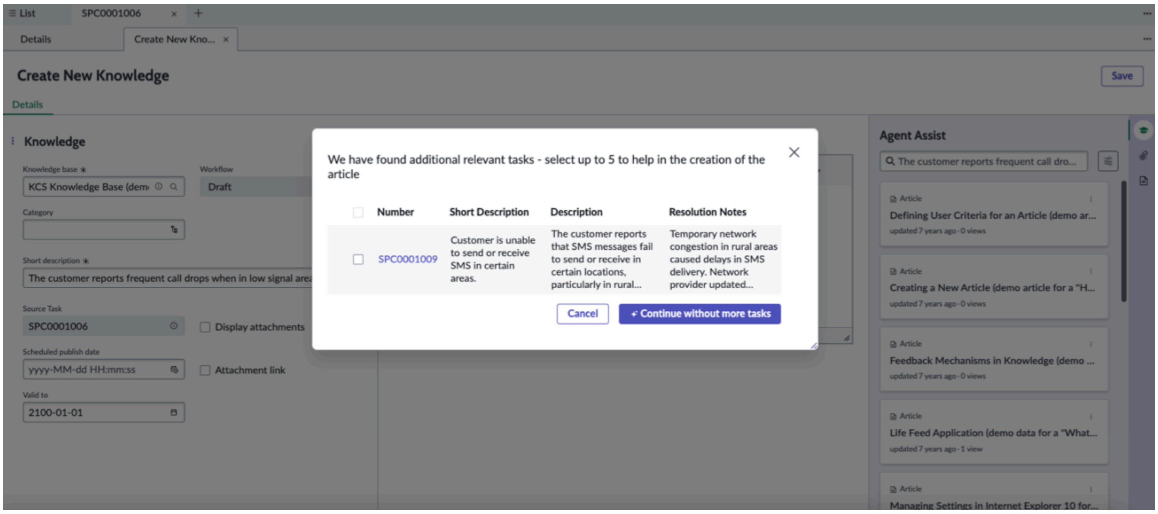
5. Select **Create article**.
6. In the Use AI to draft this article modal, select **Yes, draft with Now Assist**.

   Modal to draft article using AI

7. **Optional:** In the new modal, search for similar cases that can be used to generate the article; otherwise, select **Cancel**.

Additional relevant tasks



The completed article is displayed in the chosen template with a success message "This article was drafted by Now Assist. Be sure to review it for accuracy before saving."

Note:

- If no similar cases exist, this modal doesn't appear, and the article is created. The generated article, based on the chosen relevant records, is linked to both the account case and all the relevant cases selected.
- You can select up to five additional relevant cases in the new modal to generate the article.
- You can modify the draft before saving it. The article appears in a new tab with a unique ID number for the knowledge article and is attached to the parent record.
- If Now LLM Service fails to generate a result, an error message is displayed.
- When creating an article by using Now Assist, after the process is triggered, it can't be stopped. Now Assist continues to generate the article even if you close the modal.

8. Select the **Knowledge Base** and the **Language** in the pop-up window **What language should** `Now Assist` **draft this article in**.
9. Select **Continue**.
   The article is generated in the selected knowledge base and language, and the content is displayed in that same language.
10. Select **Insert** to paste the generated response.
11. Review the Now Assist generated article and select **Save** or **Publish**.
    The Now Assist success message disappears which means that it's no longer a Now LLM Service generated article.

Related topics

Now Assist in Knowledge Management

Summarize test for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a service problem case record to quickly understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a service problem case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a service problem case so that you can analyze the root cause of the problem.

The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

The test summarization skill checks the test results record to determine if there's enough information available to create a summary. If there's enough data, the Test summary component displays the **Summarize** button. If there isn't enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the **Diagnose** tab, select **Test results**.
4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.
   The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished summarizing the test for the service problem case, manage the results.

Option	Procedure
Expand or collapse the summary	◦ See more summary details by selecting the expand card icon ( ). ◦ See fewer summary details by selecting the collapse card icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the

Option	Procedure
	feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the test summary	Select the copy to clipboard icon ( ) to use the case summary information for another purpose, such as pasting into an email.
Refresh the test summary	Fetch the latest test run summary by selecting the refresh icon ( ).

7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.

   (Optional) If the test summarization skill isn't active, the test result is auto-populated.

   To create test groups, see Create a test group.

8. If the test summarization skill is active, clear the **wait for completion** check box in the Automated test run creation tool.
9. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Summarize test for a technology product support case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a technology product support case record to understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a technology product support case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a technology product support case so that you can analyze the root cause of the problem.

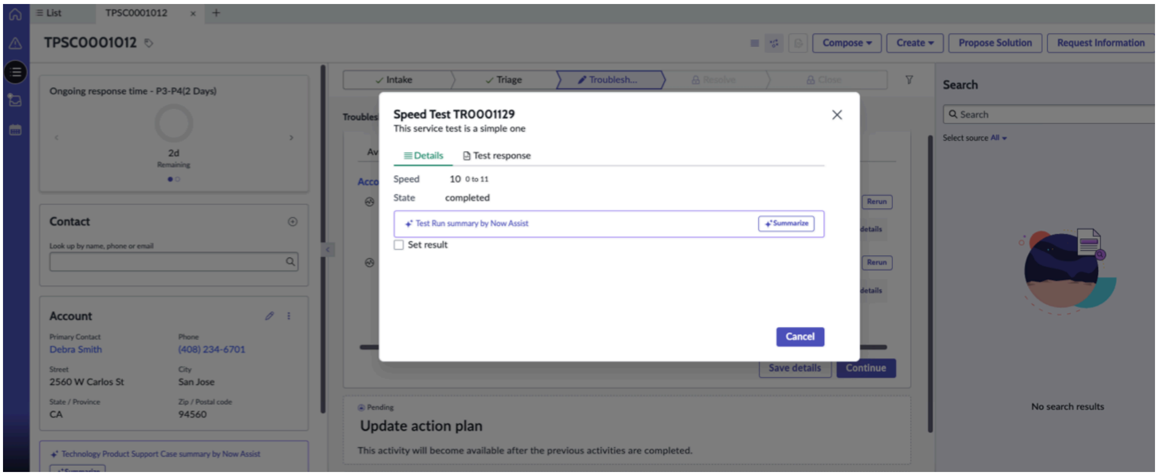
The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

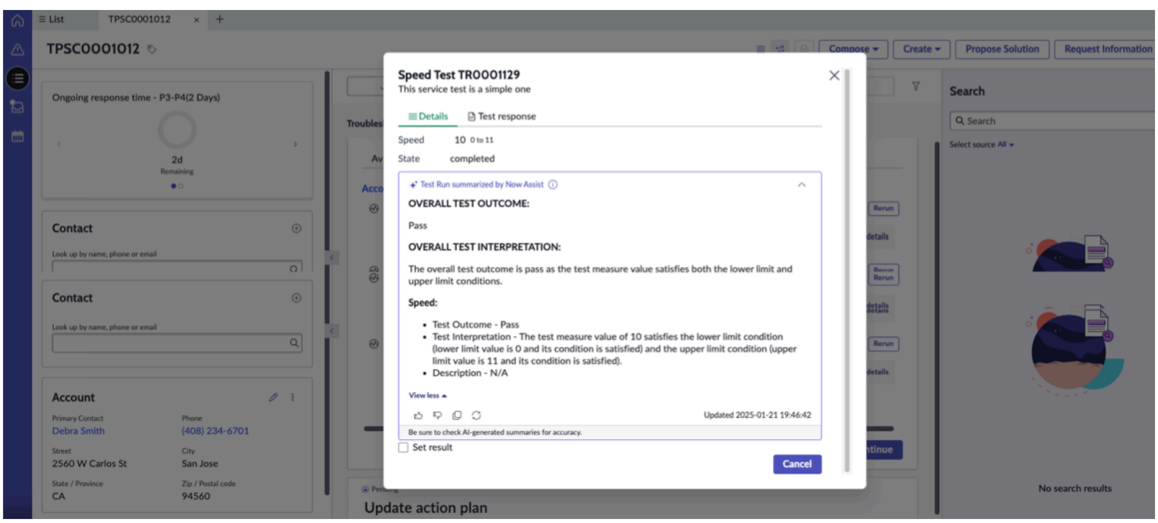
The test summarization skill checks the test results record to determine if there's enough information available to create a summary. If there's enough data, the Test summary component displays the **Summarize** button. If there isn't enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Technology Product Support Case**.
2. Open a technology product support case.
   If there are no test results available, run the tests to get test results.
3. In the **Troubleshoot** tab, select **Test results**.



4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.



   The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished summarizing the test for the technology product support case, manage the results.

Option	Procedure
Expand or collapse the summary	○ See more summary details by selecting the expand card icon ( ). ○ See fewer summary details by selecting the collapse card icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the test summary	Select the copy to clipboard icon ( ) to use the case summary information for another pur pose, such as pasting into an email.
Refresh the test summary	Fetch the latest test run summary by select ing the refresh icon ( ).

7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.
8. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Generate service summary for a product inventory using Now Assist for Telecommunications, Media and Technology (TMT)

Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary skill.

Before you begin

Role required: admin

About this task

The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, resolution tasks, and resolution details.

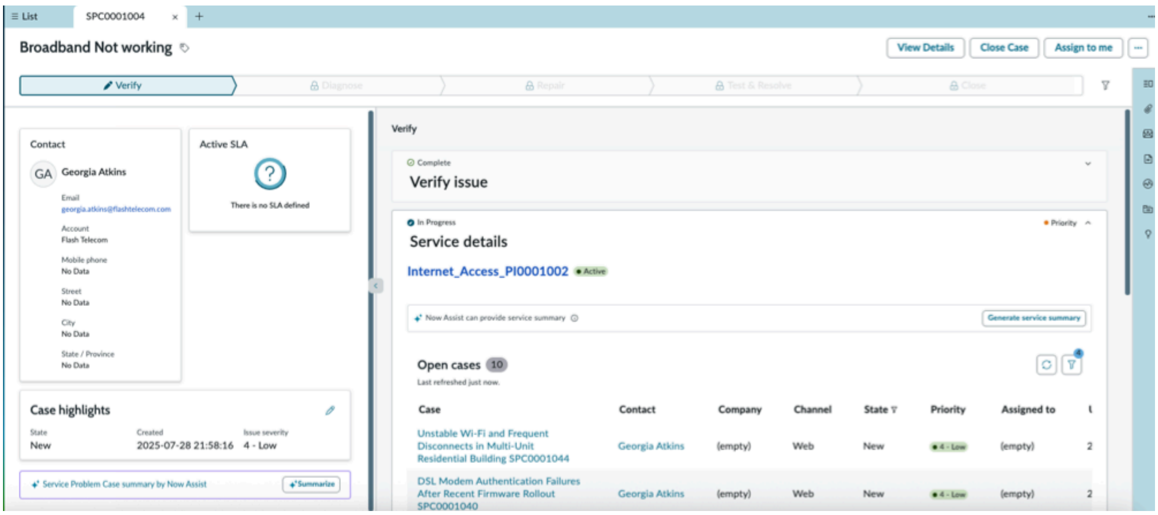
The customer service summary skill is available in CSM/FSM Configurable Workspace, you use the Service Problem Case service summary skill by Now Assist component to generate a summary.

Install the Customer Service with Service Management (com.sn_cs_sm) plugin to display the activate button for customer service summary skills.

If there's enough data, the customer service summary component displays the **Generate service summary** button.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Verify tab, select **Service details**.
4. In the Service details, select **Generate service summary**.



Note: Generating and displaying the summary may take several seconds.

5. **Optional:** After you're finished summarizing the service, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the service summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).

Option	Procedure
Copy the service summary	Select the copy to clipboard icon ( ) to use the service summary information for another purpose, such as pasting into an email.
View the information about the case summary	To check some details about the service summary, select the more info icon ( ).

Create a knowledge graph schema

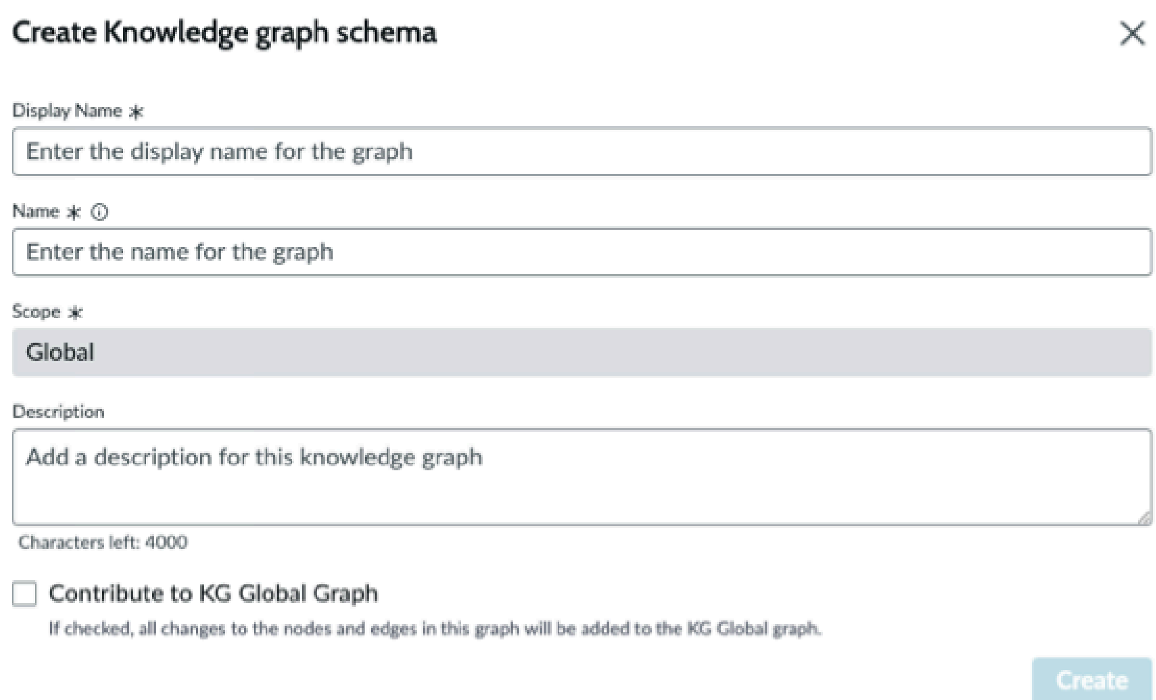
Use the Knowledge Graph (KG) to create Knowledge Graph schema.

Before you begin

Role required: sn_sprb_mgmt_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schema on the landing page.
2. Start creating a Knowledge Graph schema by selecting **Create New**.
   This is an out of the box.
3. On the form, fill in the fields.

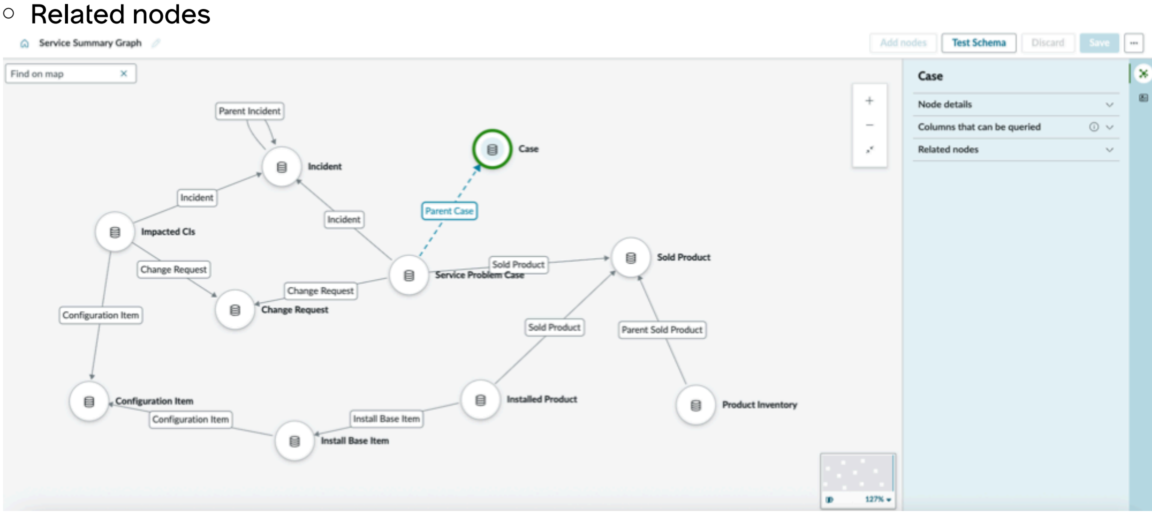


Edit Knowledge Graph Schema details form

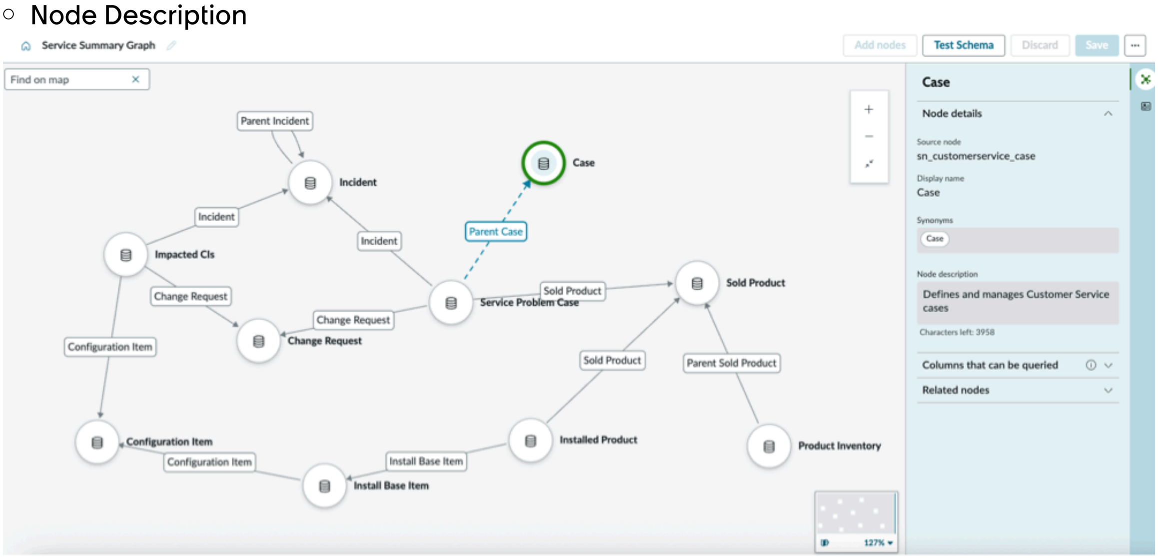
Field	Description
Display Name	Display name for the Knowledge Graph schema.
Name	Optional name for the Knowledge Graph schema.

Field	Description
Scope	Scope used when creating the Knowledge Graph schema. This field is a read only.
Description	Knowledge Graph schema overview to provide additional information to users.
Contribute to KG Global Graph	All the changes to the nodes and edges in the graph are added to the KG Global graph.

4. Select **Create**.
   The Add nodes to the Knowledge graph schema window is displayed.
5. Enter or search for the nodes that you want to add to the Knowledge Graph schema and select **Add**.
   The Knowledge Graph schema is created and displayed on the Knowledge Graph canvas.
6. In the navigation pane, add the following details:
   - Node details
   - Columns that can be queried
   - Related nodes



7. In the Node details section, you can edit the following fields.
   - Node type
   - Node Description



To manage the nodes in the Knowledge Graph schema, see Manage nodes in a Knowledge Graph schema.

8. In the Columns that can be queried section, search for and select the desired columns and select **Save**.
9. Add, delete, or edit edges in the Related nodes section and select **Save**.

   To edit the Knowledge Graph, you must copy the Knowledge Graph and adjust the settings according to your requirements.

   To edit the Knowledge Graph schema, see Edit a Knowledge Graph schema.

Customize a summary card for service summary

Customize the summary card of the service summary and UI actions according to your needs.

Before you begin

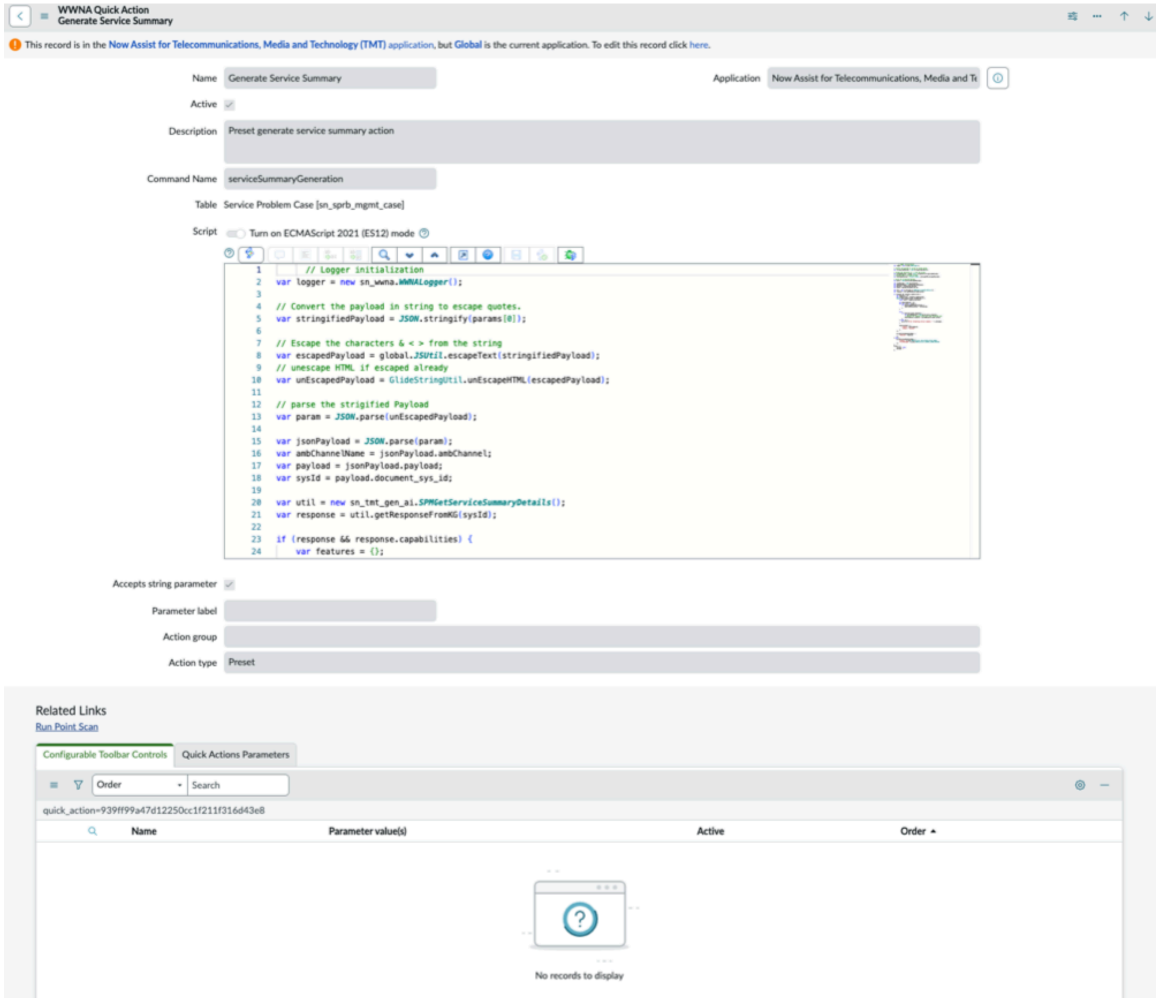
Role required: Admin

Procedure

1. Navigate to **All** > **Quick Actions** > **Now Assist context menu Actions**.
2. In the Quick Actions list, select **Generate Service Summary** record.
3. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.

servicenow



4. On the record, update the fields.

   To customize the UI Builder pages, see Customize UI Builder pages using components.

   To configure the UIB Now Assist context menu component, see Now Assist context menu UIB Setup.

5. Select **Update**.

Request generative AI capabilities in TMT using the Now Assist panel

Request the contextual generative AI capabilities by using the conversational interface in the Now Assist panel. These capabilities include service problem case summary or resolution notes in the TMT application.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can use the Now Assist panel in CSM/FSM Configurable Workspace to request a service problem case summary and generate service problem case resolution notes.

For more information about the Now Assist panel, see Now Assist panel. For information about activating the Now Assist panel, see Activate the Now Assist panel standard chat.

Procedure

1. Log in to an instance where the Now Assist for TMT application is installed.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case** > **All**.
3. Open a service problem case.
4. From the header menu, select the Now Assist icon (✦) and request the generative AI capabilities in TMT for a service problem case.
5. Select the relevant generative AI capability from the Now Assist panel.
   - To summarize the service problem case, select **Summarize a record**.
   - To generate the service problem case resolution notes, select **Generate resolution notes**.

Summarize an account onboarding case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the account onboarding case record. Quickly understand the case context by using the account onboarding case summarization skill in the Now Assist for TMT application.

Before you begin

Role required: sn_acct_lc.agent

About this task

The account onboarding case summarization skill provides you with a concise summary including details about each stage in the account boarding lifecycle. With this skill, you can do the following tasks:

- Generate an initial summary of an account onboarding case so that you can understand the onboarding case context.
- Summarize all the work that has been done on an account onboarding case.

The account onboarding case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Account Onboarding Case summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the account onboarding case record to generate a summary.

Note: The account onboarding case summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The account onboarding case summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the account onboarding case record.
- When an agent refreshes the account onboarding case record page.

If there's enough data, the Account Onboarding Case summary component displays the **Summarize** button. If there isn't enough data, the component displays a message in place of the button.

Note: The account onboarding case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Account Onboarding Case**.
2. Open an account onboarding case.
3. In the Account Onboarding Case summary by Now Assist component, select **Summarize**. The Account Onboarding Case summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an account onboarding case, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize an engagement using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the engagement record. Get up to speed on success initiatives, outcomes, risks, and internal plays associated with an engagement.

Before you begin

Role required: admin

About this task

The engagement summary skill provides you with a concise summary of all activities and key points of information associated with an engagement. With this skill, you can do the following tasks:

- Generate an initial summary of the engagement so that you can understand the context.
- Summarize all the work associated with an engagement.

The engagement summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Engagement summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the engagement record to generate a summary.

The engagement summarization skill checks the engagement record to determine if there is enough information available to create a summary:

- When an agent opens the engagement record
- When an agent refreshes the engagement record page

If there is enough data, the Engagement summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The engagement summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Engagements**.
2. Open an engagement.
3. In the Engagement summary by Now Assist component, select **Summarize**.
   The Engagement summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).

Option	Procedure
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a touchpoint using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the touchpoint record. Get a quick summary of all the meetings and emails exchanged between different stakeholders and any follow up activities.

Before you begin

Role required: sn_acct_lc.agent

About this task

The touchpoint summary skill provides you with a concise summary of the different touchpoints in the engagement lifecycle. With this skill you can do the following tasks:

- Generate an initial summary of the touchpoint so that you can understand the context.
- Summarize all the work associated with a touchpoint.

The touchpoint summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Touchpoint summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the touchpoint record to generate a summary.

Note: The touchpoint summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The engagement summarization skill checks the touchpoint record to determine if there is enough information available to create a summary:

- When an agent opens the touchpoint record
- When an agent refreshes the touchpoint record page

If there is enough data, the Touchpoint summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note: The touchpoint summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Touchpoints**.
2. Open an touchpoint.
3. In the Touchpoint summary by Now Assist component, select **Summarize**.
   The Touchpoint summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note: Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize an internal play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a internal play record and all associated internal play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The internal play summary skill provides you with a summary of the internal play record and associated internal play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Internal play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the internal play record to generate a summary.

The internal play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the internal play record.
- When an agent refreshes the internal play record page.

Note: The internal play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Internal plays**.
2. Open an internal play and select **Summarize**.
   The Internal play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes primary goal (subject, description), engagement, account, product, progress, due date, squad, and details of any contracts under consideration.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of internal play tasks, number of open and closed tasks.
   - Next steps: Shows a summary list of all open internal play tasks, required agent actions, and tasks that are due in the next 7 days.

   Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the internal play, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ).

Option	Procedure
	This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a customer play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a customer play record and all associated customer play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The customer play summary skill provides you with a summary of the customer play record and associated customer play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Customer play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the customer play record to generate a summary.

Note: The customer play summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The customer play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the customer play record.
- When an agent refreshes the customer play record page.

Note: The customer play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Customer plays**.
2. Open a customer play and select **Summarize**.
   The Customer play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:

- Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
- Progress updates: Summarizes current status (work notes, recent emails), details of meetings associated with the customer play, total number of customer play tasks, number of open and closed tasks.
- Next steps: Shows a summary list of all open customer play tasks, required agent actions, scheduled meetings, and tasks that are due in the next 7 days.

Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

3. **Optional:** After you're finished summarizing the customer play, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Summarize a success initiative using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a success initiative record and all associated success tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The success initiative summary skill provides you with a summary of the success initiative record and associated success initiative tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Success initiative summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the success initiative record to generate a summary.

Note: The success initiative summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The success initiative summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the success initiative record.
- When an agent refreshes the success initiative record page.

Note: The success initiative summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Success initiatives**.
2. Open a success initiative and select **Summarize**.
   The Success initiative summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of tasks, number of open and closed tasks, and any related tables.
   - Next steps: Shows a summary list of all open tasks, required agent actions, and tasks that are due in the next 7 days.

   Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the success initiative, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ).

Option	Procedure
	This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another purpose, such as pasting into an email.
View the information about the summary	To check some details about the summary, select the more info icon ( ).

Summarize a risk signal using Now Assist for Telecommunications, Media and Technology (TMT)

Generates a summary from a risk signal and issues summarization record and all associated tasks.

Before you begin

Role required: sn_acct_lc.agent

About this task

The risk signal and issues summary skill provides you with a summary of the risk signal and issues record and associated risk occurrences and solutions. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Risk signal and issues summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the risk signal and issues record to generate a summary.

The risk signal and issues summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the risk signal and issues record
- When an agent refreshes the risk signal and issues record page

Note: The risk signal and issues summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Risk Signal and Issues**.
2. Open a risk and select **Summarize**.
   The Risk signal and issues summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:

- Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, and customer contact details.
- Progress updates: Summarizes status of work notes, activities, and recent emails.
- Next steps: Provides recommendations and next steps according to the open Risk Solution records.. If no records are open, the agent generates a summary based on the Risk Category.

Note: Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

3. **Optional:** After you're finished summarizing the risk signal and issues, manage the results.

Option	Procedure
View more or less summary details	◦ To see more details summary details, select the View more icon ( ). ◦ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	◦ If you think that the summary was helpful, select the helpful icon ( ). ◦ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another pur pose, such as pasting into an email.
View the information about the summary	To check some details about the summary, se lect the more info icon ( ).

Draft close notes for a risk signal using Now Assist for Telecommunications, Media and Technology (TMT)

Automatically generate closure notes and close eligible risk signals at the end of each day based on the status of their associated risk solutions.

Before you begin

Role required: sn_acct_lc.customer_success_agent

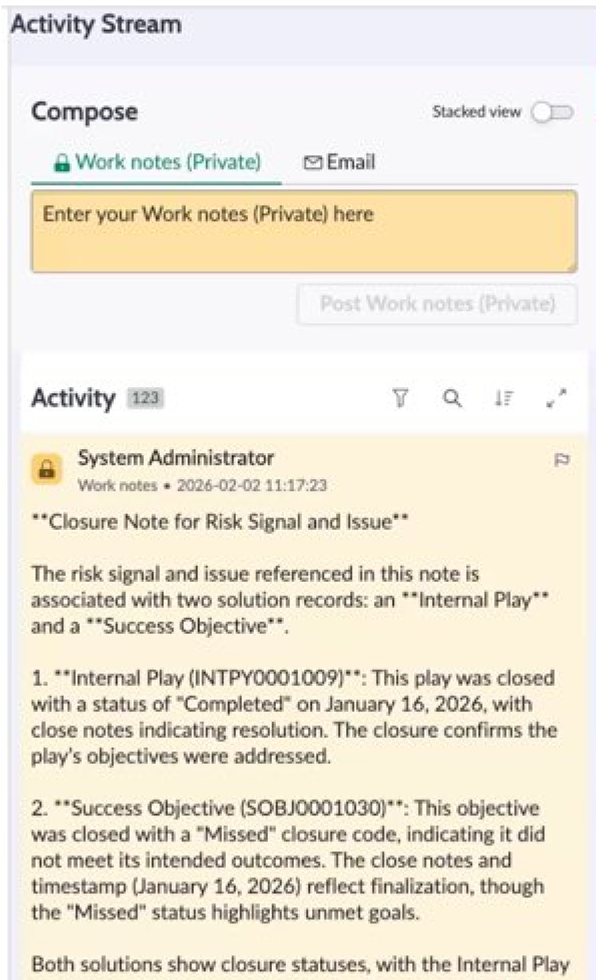
About this task

A scheduled job runs everyday and automatically drafts closure notes for all risk signals eligible to be closed that meet the following criteria:

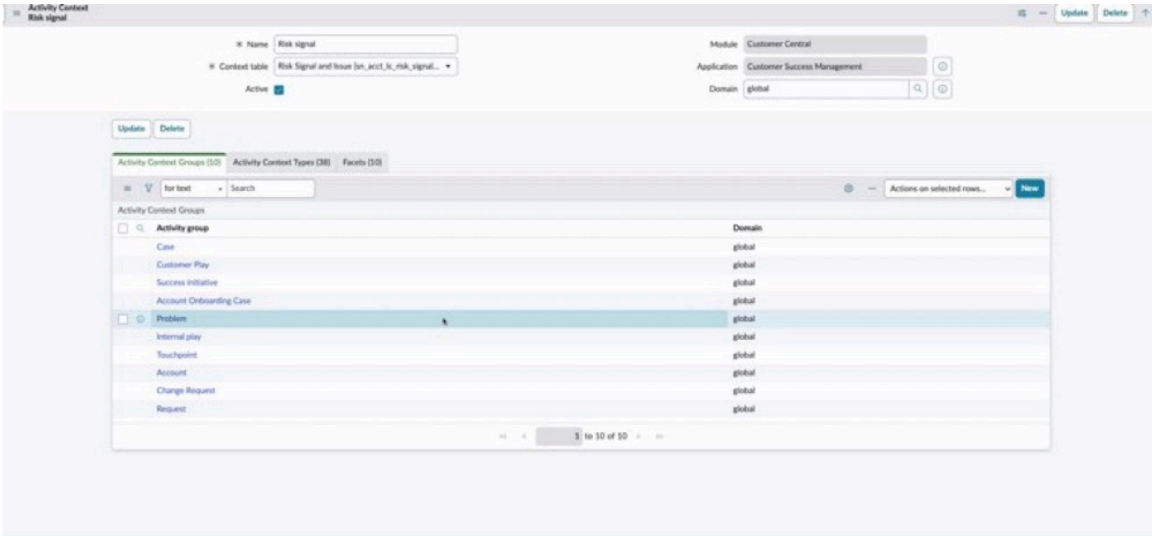
- All associated risk solutions are in a closed or inactive state.
- No new risk occurrences have been created after the last runtime of the scheduled job.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Activate** in the **Draft close notes** card.
3. Select the user role that can use this skill and select **Save** to activate the skill.
   The daily scheduled job identifies all eligible risk signals, reviews the activity data for each eligible risk signal from the associated risk solutions and generates closure notes. The Closure notes and the State are updated on the risk signal record and are visible in the Activity stream.

   The activity contexts used to generate the closure notes are predefined and available with the base system. If you want to use additional fields or tables when generating closure notes, you must add additional activity contexts using the Customer Central guided setup. Navigate to **All** > **Customer Central** > **Activity Contexts** and select **Risk signal**, create an activity context group and map it to the additional table you want to use.



For more details on creating the activity context group, see Configure activity groups for the Customer History view.

Create touchpoints and meeting records using Now Assist for Telecommunications, Media and Technology (TMT)

Send the email to instance to create the touchpoint and meeting records directly from the inbound email using Now Assist for Telecommunications, Media and Technology (TMT).

Before you begin

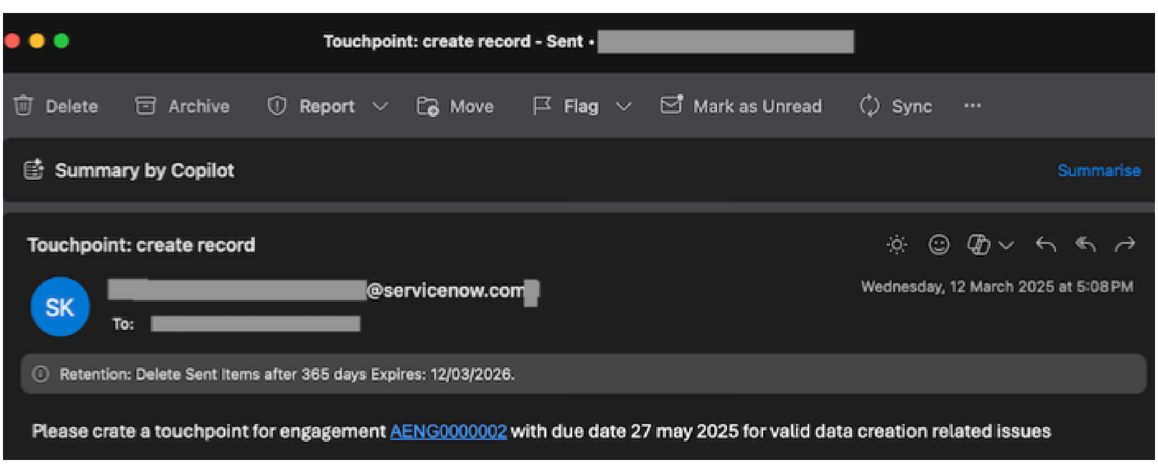
Role required: Success agent

To enable the email sending, see Outbound email configuration.

To enable the email receiving, see Inbound email configuration.

Procedure

1. Launch the email application.
2. Select **New Email**.
   The new Email must contain the following information:



Field	Descriptions
From	Email id of the sender.
To	Email id of the instance that is instancename@service-now.com. For example: devgen@service-now.com
Subject	The subject of the email must start with the prefix Touchpoint: For example: Touchpoint: Create a touchpoint for test.
Email message	For Touchpoints, the Email message must contain the required fields: ◦ Engagement number ◦ Due date ◦ Subject ◦ Description For Meetings, the Email message must contain the required fields: ◦ Source ◦ Start date and time ◦ End date and time ◦ Meeting subject

3. Select **Send**.

   Note: The instance may take several seconds to receive the email.

Result

- In the instance, the Inbound Email Actions validates the email.
- If the validation fails, you receive the email with the validation error and template description.
- If the validation passes, a record is created in the touchpoint and you receive a success email with the link to the created record.
- The emails are prepared and pushed to the outbound queue where they're scheduled to be sent.

Analyze metric data trend

Retrieves and analyzes health metric data for an engagement.

Before you begin

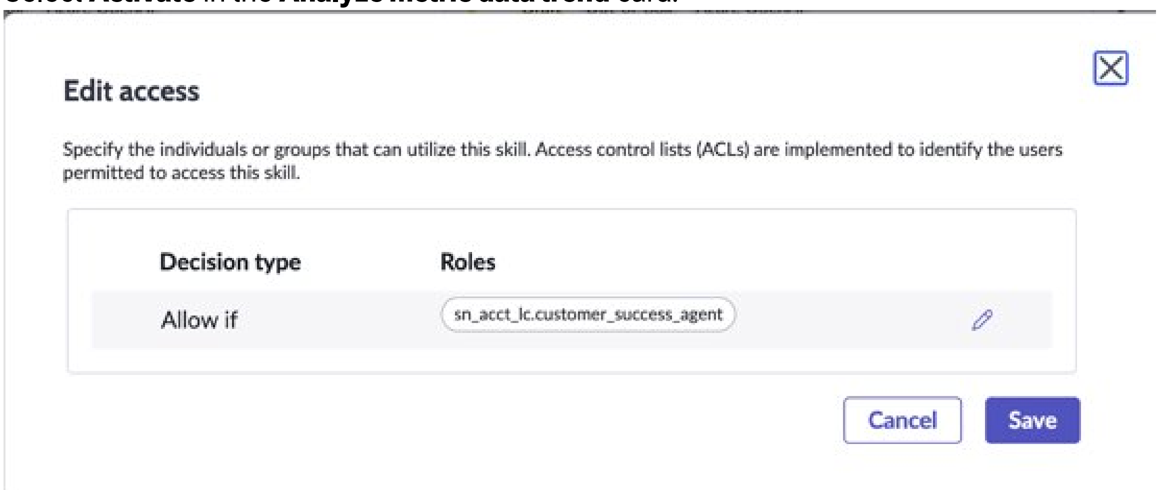
Role required: sn_acct_lc.customer_success_agent

About this task

Collects and analyzes metric data for an engagement and determines if a risk signal is to be created. The Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection monitor engagement health agentic workflow uses the metric data to monitor the health score and generates risk signals when the Poor and Neutral range thresholds defined in the Color Banding table are exceeded. You can view the status of the metric collection in the Now Assist panel.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Activate** in the **Analyze metric data trend** card.



3. Select the user role that can utilize this skill and select **Save** to activate the skill.
   The collected metric data is used by the Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection monitor engagement health agentic workflow.

Generate a product adoption roadmap using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a product adoption roadmap with products or capabilities organized into lanes based on engagement data and insights from similar engagements.

Before you begin

- The **Lookup similar engagements** skill must be activated.
- Role required: sn_acct_lc.customer_success_agent

About this task

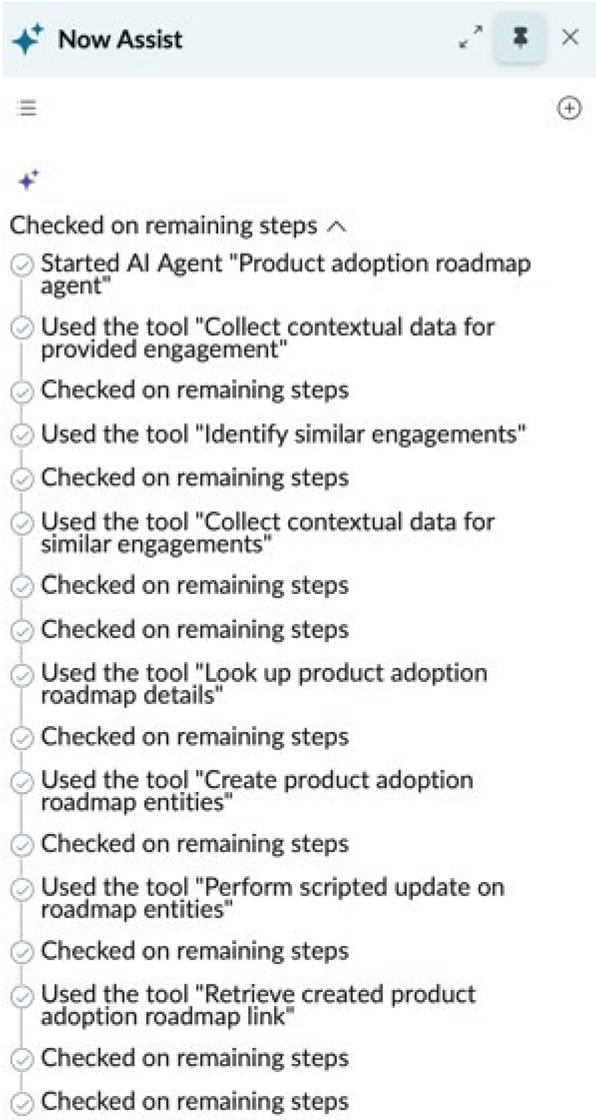
Use Now Assist to generate a roadmap by analyzing the engagement's details including health, success blueprints, product adoption data, and renewal date. The AI agent identifies similar engagements in the system that have existing roadmaps and uses those patterns to organize items into lanes. After the roadmap is generated, you can further refine the roadmap as needed.

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and navigate to the **Success portfolio overview** page.
2. Select an engagement from the list and navigate to the **Product adoption** tab.
3. In the Product adoption roadmaps section, select **New product adoption roadmap**.
4. Enter a name and description from the roadmap and select **Next**.

5. Select your product adoption implementation strategy:
   - By product: Organize entire products to create a high-level, strategic adoption plan. Use this as a guideline on how to implement products over time.
   - By capability: Organize specific capabilities within products for short term, tactical planning. Use this to focus on adopting features and functions.
6. Select **Now Assist** to create a quick draft of your roadmap.
7. Select a value from the **Phase** drop down field to determine the lanes for your roadmap.
8. Select **Generate roadmap**.
9. The Product adoption roadmap agent does the following:
   - Starts creating the roadmap with lanes based on the Phase field.
   - Collects contextual data from the current engagement including objectives, outcomes, and touchpoints.
   - If similar engagements are present, it identifies the ones with existing roadmaps.
   - Analyzes how the roadmap was organized in the most relevant similar engagement.
   - Arranges products or capabilities into lanes based on the patterns identified.

   You can view the steps in the Now Assist panel.



10. After the roadmap has been generated, you will see the following details in the Now Assist panel.

- A link to view the completed roadmap.

  Note: The roadmap is in a Draft state and you can make changes before you finalize it.

- A summary of the rearrangements logic and the organization of the lanes.

Note: You can also request an explanation of the rearrangement logic in the Now Assist panel.

11. Review the generated roadmap, make any necessary adjustments by dragging items between lanes and select **Finalize roadmap**.

Related topics

Create a product adoption roadmap

View a product adoption roadmap

Renewal insight engine skill

Analyzes the renewal likelihood and expansion potential of an engagement or contract and generates recommended actions.

Before you begin

Role required: sn_acct_lc.customer_success_agent

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

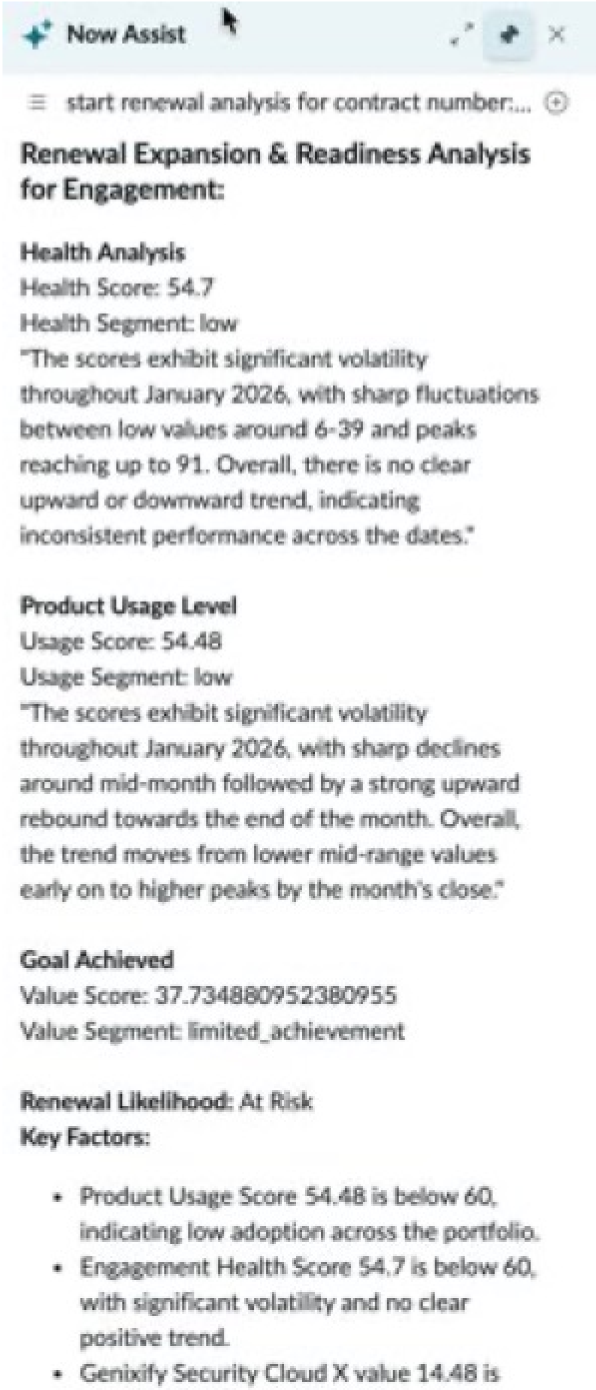
About this task

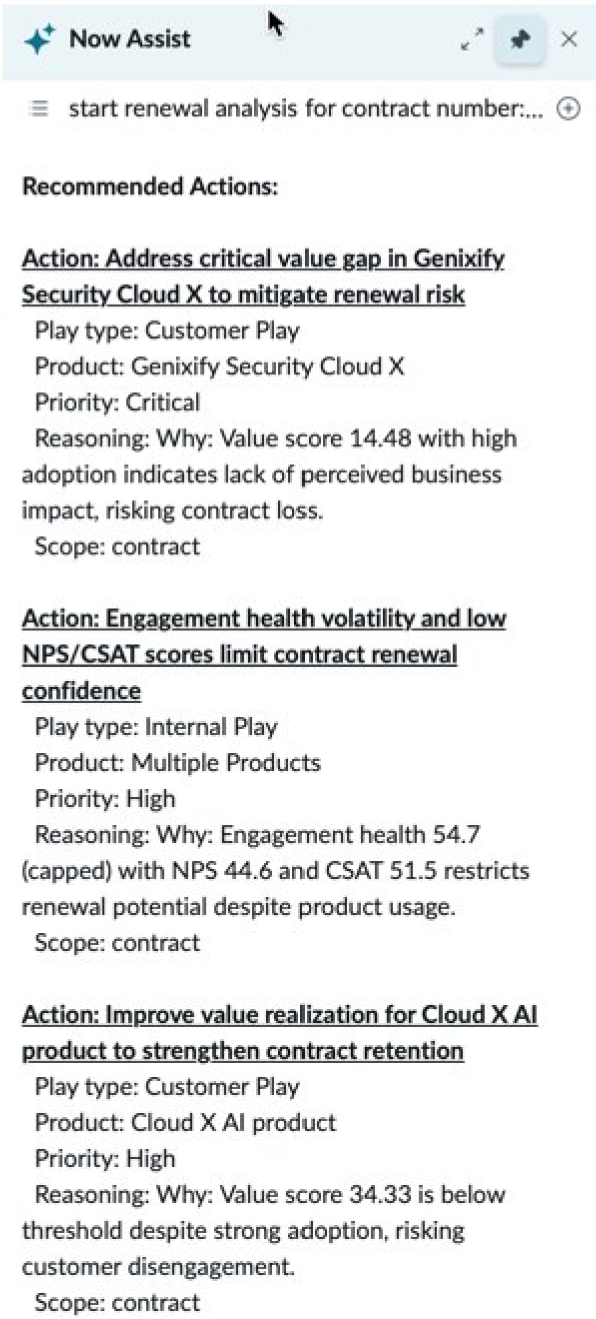
The Renewal insight engine skill evaluates individual product metrics, health metrics, health score trends, usage trends, and value scores to generate renewal assessments. The skill provides a granular analysis by evaluating data at the product level rather than using aggregated scores. The skill is automatically triggered by the Now Assist for Telecommunications, Media and Technology (TMT) Support renewals and expansion workflow and runs in two modes:

- Engagement mode: Analyzes all products and health metrics for the overall engagement and generates the renewal likelihood, expansion potential, and up to three recommended actions for the engagement.
- Contract mode: Analyzes contract-specific products while also considering the overall engagement health and non-contract products, and generates the renewal likelihood, expansion potential, and up to three recommended actions for the contract.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Activate** in the Renewal Insight Engine card.
3. Select the user role that can use this skill and select **Save** to activate the skill.
   The Renewal Insight Engine skill is automatically triggered when the Now Assist for Telecommunications, Media and Technology (TMT) Support renewals and expansion agentic workflow runs. When the workflow is completed, the following output is generated:
   - Renewal likelihood: The predicted renewal likelihood including an assessment such as Very High, High, Moderate Risk, At Risk, or Critical Risk, and the key factors that influenced the assessment.
   - Expansion potential: The potential for account expansion including an assessment of Strong, Moderate, or Limited, the probability, and the target products identified for expansion.
   - Recommended actions: Up to three recommended actions in the form of internal plays or customer plays, each specifying the action, play type, target product, priority, and reasoning. The renewal assessment report is automatically added to the work notes of the generated internal play records.


Now Assist
start renewal analysis for contract number:...
Renewal Expansion & Readiness Analysis for Engagement:
Health Analysis
Health Score: 54.7
Health Segment: low
"The scores exhibit significant volatility throughout January 2026, with sharp fluctuations between low values around 6-39 and peaks reaching up to 91. Overall, there is no clear upward or downward trend, indicating inconsistent performance across the dates."
Product Usage Level
Usage Score: 54.48
Usage Segment: low
"The scores exhibit significant volatility throughout January 2026, with sharp declines around mid-month followed by a strong upward rebound towards the end of the month. Overall, the trend moves from lower mid-range values early on to higher peaks by the month's close."
Goal Achieved
Value Score: 37.734880952380955
Value Segment: limited_achievement
Renewal Likelihood: At Risk
Key Factors:
Product Usage Score 54.48 is below 60, indicating low adoption across the portfolio.
Engagement Health Score 54.7 is below 60, with significant volatility and no clear positive trend.
Genixify Security Cloud X value 14.48 is



Automate transforms with Now Assist for TMT

Use the Now Assist for TMT Transform Mapping Assist feature to automatically transform inbound and outbound data between provider and consumer tables.

Before you begin

Role required: admin

About this task

The Transform Mapping Assist skill is designed to do the following:

- Automatically generate choice mappings between provider and consumer tables.
- Provide meaningful error messages if the inbound or outbound data cannot be transformed.
- Help save time and reduce manual effort by automating the transformation mapping process.
- Help reduce errors and enhance the quality of integrations through automatic mapping.

Procedure

1. Navigate to **All** > *Service Exchange* **Provider** > **Administration** > **Transforms**.
2. Click **New** and create a simple transform.
   See Create a transform in Service Exchange for instructions. The Now Assist for TMT Transform Assist Mapping can be used only with simple transforms.
3. Select the provider and consumer tables and the related fields.
4. Click **Mapping Assist**.
   Transform mappings are generated and inserted into the Transform lines related list.

   Note:

   - The Transform Mapping Assist feature can be used only if you select choice list fields in the Provider and Consumer fields.
   - You can delete all the generated transform lines to rerun the mapping if needed.
   - If you try to create a transformation mapping between different types of fields, you will see the following warning message:

     `The selected fields are different. Are you sure you want to map these fields? This action may lead to unintended results.`

     Click **OK** to continue with the mapping. If no mappings are found, an error message is displayed. You can either review the configuration settings and modify as required or create the mappings manually.

Generate Telecom customer 360 insights

Generate customer health insights and recent customer issue insights for a customer or consumer account.

Note: This skill is available only if Telecommunications Customer 360 is installed and requires the `sn_telecom_c360.admin` role.

The Generate Telecom Customer 360 Insights skill is enabled by default and automatically generates AI-powered insights for a customer or consumer account when you navigate to the Telecommunications Customer 360 home page. This skill triggers the following two sub-skills in parallel:

- Telecom C360 customer health insights: This skill analyzes customer sentiment from recently closed cases and service problems to assess relationship health. It provides sentiment classification, trend analysis, and lists analyzed cases, with an extensible data provider that allows customers to incorporate custom sentiment data sources.
- Telecom C360 top customer issue insights: This skill analyzes recent open cases, service problem cases, and customer interactions to provide insights on top customer issues. It helps agents quickly understand a customer's current issues and prioritize resolution efforts. Works at both consumer and account levels.

The skill uses the following data sources to generate insights:

- Cases
- Service problem cases
- Interactions
- Sentiment data

The insights are automatically displayed when a customer or consumer account is opened. See Insights card for details.

Customize data sources

The skill uses the CustomerInsightsDataProvider scripted extension point to retrieve data. Two implementations are available with the base system:

- CustomerHealthDataProvider: Retrieves cases, interactions, and sentiment data to generate customer health insights.
- RecentCustomerIssuesData Provider: Retrieves cases and service problem cases to generate recent customer issue insights.

You can modify the existing implementation to retrieve data from additional sources or create your custom implementation. For more details on configuring extension points, see Using extension points to extend application functionality.

Generate summary for remote hands case record

Remote Hands Request Summarization is a capability that generates a contextual summary of a Remote Hands case by combining current case data with insights from similar historical cases, using information submitted by the DCIM user through the CSM portal.

Before you begin

Role required: Remote hands agent (sn_remote_hands_agent)

About this task

Remote Hands Request Summarization is an Now Assist capability that provides a contextual overview of a Remote Hands case by combining current case data with insights from similar historical cases. Users with the Remote Hands Agent role can generate a summarized view of a Remote Hands case by selecting the **Summarize** option from either the Remote Hands Case table or the CSM/FSM Configurable Workspace. The information displayed in the summary is populated from the data entered by the DCIM user in the Remote Hands case record through the Customer Service Management (CSM) portal.

The Case Overview section displays key metadata retrieved from the Remote Hands Case table, including Case Category, Priority, Channel, and State. The Case Details section displays the Short Description and Description fields from the Remote Hands case record, providing detailed context about the current request. The Related Case Summary section is generated based on similar cases from the related cases present in the remote hands case record. Within this section, the Case Reference lists up to five similar cases identified by the system, the Case Issue displays the Short Description of each related case, and the Case Resolution displays the Resolution Notes recorded in the related cases.

This skill available in CSM/FSM Configurable Workspace and in Core UI

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Remote Hands Cases**.
2. Select a case record to open and review the case details.
3. Select **Summarize** to view the case summary.
   The summary includes the overview of the case, case details, and related case summary. Switch to the Related Cases tab to view the related cases.
4. **Optional:** After you're finished summarizing a Remote Hands case, manage the results.

Option	Procedure
View more or less summary details	○ To see more details summary details, select the View more icon ( ). ○ To see fewer summary details, select the View less icon ( ).
Provide feedback for the summary	○ If you think that the Remote Hands case summary was helpful, select the helpful icon ( ). ○ If you think that the summary wasn't help ful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_genera tive_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the Remote Hands case summary information for another purpose, such as pasting into an email.
View the information about the case summa ry	To check some details about the summary, se lect the more info icon ( ).

Using adaptive desktop actions for Customer Experimentation

Use adaptive desktop actions in Customer Success Management to test prompt-driven models on your workflows.

With adaptive path desktop actions, you describe what task you want to accomplish on web at a high level in the tool configuration. The AI agent processes the request, generates an execution plan, and dynamically determines the specific steps needed to complete the task by analyzing the engagement's details including health, success blueprints, product adoption data, and renewal date.

For more information about AI desktop actions, see AI Desktop Actions.

Product Support for Technology

ServiceNow® Product Support for Technology provide a way for telecommunications, media, and technology (TMT) service providers to deliver end-to-end support, while understanding customer impact, and offering transparent communication to all parties involved in the support process.

Applications and features

Proactive Service Experience Workflow	Technology Product Support Case	API Notification Management
Deliver end-to-end workflows to resolve network related incidents, and proactively notify impacted customers.	Resolve the customer issues faster using guided, step#by#step playbooks.	Notify third#party systems of proactive or reactive cases in real time.

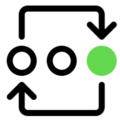
Additional resources

- Learn more about what's new and changed, see the Product Support for Technology release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Product Support for Technology 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 Product Support for Technology users at Now Community.

Sales Customer Relationship Management for Telecommunications

The ServiceNow® Sales CRM for Telecommunications enables to unify your sales, fulfillment, and service operations on one platform.

Explore	Configure
Learn more about Sales CRM for Telecommunications	Plan and configure your implementation

Use  Use Sales CRM for Telecommunications as an agent	

Additional resources

- Learn more about what's new and changed, see the Sales CRM for Telecommunications release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Sales CRM for Telecommunications 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 ServiceNow Impact.
- Connect with other Sales CRM for Telecommunications users at Now Community.

Exploring Sales CRM for Telecommunications

Learn how the ServiceNow® Sales CRM for Telecommunications application can help your organization manage the sales-to-fulfillment cycle for your customers. By adopting an integrated approach to quoting, ordering, and service delivery, you can increase operational efficiency and improve your customer experience.

Sales CRM for Telecommunications overview

With the Sales CRM for Telecommunications application, you can unify your sales, fulfillment, and service operations on one platform. You can streamline quoting and pricing, orchestrate orders from sale to activation, and provide your teams with visibility into customer systems and tools that they need to deliver services. You can unify your sales, fulfillment, and service operations on one AI-powered platform and streamline quoting and pricing, configure complex bundles with guided workflows, and orchestrate orders seamlessly from sale to activation. Your teams can track orders with real-time visibility, proactively monitor issues, identify expansion and renewal opportunities, and prevent revenue loss while driving customer loyalty.

Key benefits

With Sales CRM for Telecommunications, you can:

- Scale sales productivity: Automate configuration, pricing, and approvals with AI-powered workflows, freeing agents to focus on customer relationships and closing deals.
- Reduce revenue leakage: Track orders from quote to activation on one platform, while AI agents detect and resolve issues before they impact service delivery.
- Maximize customer lifetime value: Proactively flag renewals and surface upsell opportunities at the right time with a complete customer view.

- Accelerate sales cycles: Configure accurate bundles quickly with guided workflows and unified catalogs while maintaining compliant pricing.
- Streamline order fulfillment: Coordinate across systems with complete visibility, eliminating manual handoffs and costly rework.
- Improve lead management: Score and prioritize leads with AI while speeding up quoting to help teams achieve targets.
- Accelerate implementation: Deploy faster using industry-aligned data models and built-in APIs without replacing existing systems.

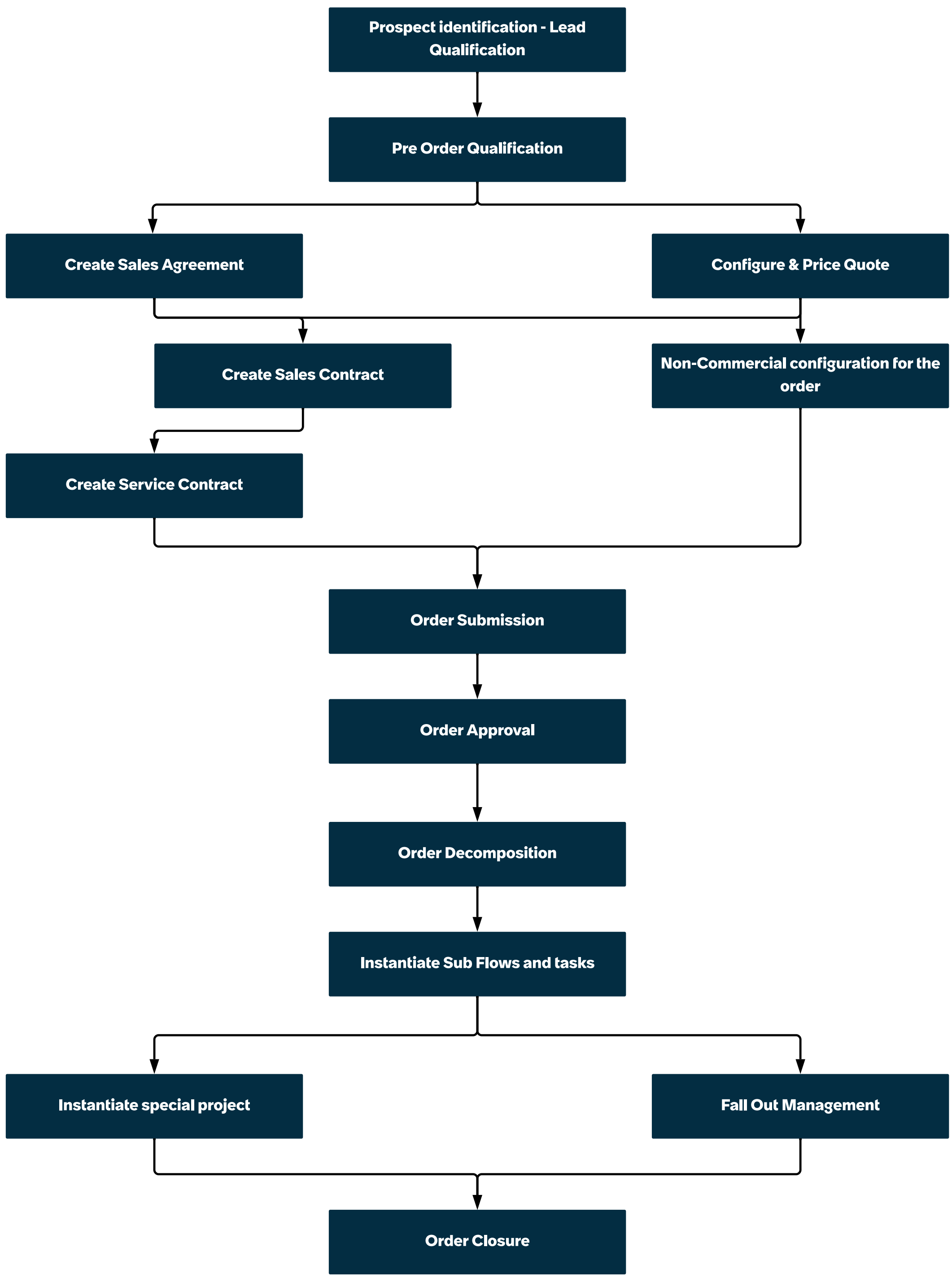
Key Sales CRM for Telecommunications capabilities

The Sales CRM for Telecommunications application includes the following capabilities:

Capability	Description
Lead and opportunity management	Tracks leads and opportunities from first contact through to quote with AI-powered lead scoring and needs analysis. Agents qualify leads faster and track opportunities without switching systems, increasing sales productivity.
Configure, price, and quote (CPQ)	Guides agents to build service combinations with catalogs that support complex product bundles, subscriptions, and usage-based pricing. Shortens sales cycles and increases win rates while protecting margins.
Order management	Automates order fulfillment from sale to service activation with intelligent workflows that coordinate across systems. Activates services faster while eliminating revenue loss from failed orders.
Renewal workflows	Provides a complete view of services and subscriptions with automated renewal workflows for proactive outreach. Protects recurring revenue by identifying renewal risks early and surfacing expansion opportunities.
Industry aligned (TMF APIs)	Get the details of ServiceNow® implementation of TM Forum (TMF) APIs for Telecommunications, Media, and Technology (TMT) products.

Sales CRM for Telecommunications workflow

The Sales CRM for Telecommunications workflow shows the end-to-end process for managing sales orders, from initial prospect identification through order closure.



Sales CRM for Telecommunications lifecycle stages

This diagram showcases the following key stages in the lifecycle including lead qualification, contract creation, order processing, and fulfillment activities:

1. **Prospect identification - Lead qualification**: This is the initial stage where potential customers are identified and qualified as leads. At this stage, account information isn't mandatory, allowing sales teams to capture leads without requiring complete customer details. The product catalog is optional at this point, though lead line items can reference catalog items to provide early product visibility and aid in qualification efforts.

2. **Pre-order qualification**: The lead is converted to an opportunity, establishing a formal sales pursuit linked to a specific customer. An opportunity record is created with product line items tailored to the customer's needs and context. At this stage, the opportunity must be linked to a customer account. The product catalog remains optional but, when used, enables reference to specific catalog items and preliminary pricing estimates. This establishes the product configuration framework that supports detailed pricing and configuration in later stages.
3. **Create sales agreement / Configure, price, and quote**: This stage represents a critical juncture where two parallel paths work through a bidirectional relationship, allowing continuous interaction and alignment between commercial terms and detailed pricing. The bidirectional arrows between these two paths indicate continuous interaction, allowing updates to commercial terms in the agreement to flow to pricing in the quote, and vice versa.
    - **Configure, price, and quote**: Handles the detailed commercial configuration, pricing, and feasibility validation to ensure the proposed solution can be delivered. Feasibility results determine offer eligibility, compatibility, and pricing. The account is mandatory with a complete structure and hierarchy, and location information for all accounts must be provided. Site-level product configuration occurs at each child account, and global SLAs from the sales agreement apply automatically. The offer is configured with confirmed pricing, and approvals or repricing activities are completed. Quote versions accommodate iterative refinement. Quote confirmation produces a summary document and requires legal signature before proceeding to contract creation.
    - **Create sales agreement**: Establishes the commercial framework and negotiates terms and conditions that govern all subsequent quotes and the entire customer relationship. Agreement is the reference for future quotes. Customer account is mandatory at the legal level, product catalog is also mandatory. Global level service-agnostic SLAs are negotiated that cascade to all service contracts. Terms and conditions for partner services are also negotiated at this level.

      Note: This is applicable if an existing customer wants to create quote. In this case, the existing contract is used as a reference and a quote is immediately generated.

4. **Contract management / Create sales contract**: Contracts can be sales contract or service contracts.
    - Sales contract: Following quote confirmation, the sales contract represents the legally binding commercial agreement between a customer and service provider. Quote confirmation is mandatory before proceeding, and accounts with contacts at the child level must be established. The sales contract directly reflects quote line items, capturing the confirmed commercial configuration, pricing, and terms.
    - Service contract: Represents a post-confirmation contractual agreement that handles non-commercial configuration with entitlements and service level commitments. Entitlements are mandatory, modeled as Product Offering (PO) types, and must follow the global SLAs established in the sales agreement. Service contracts are created at the child account or site level based on specific quote Line Item configurations including routing type, access type, and POP redundancy requirements.
5. **Order submission**: The order consolidates all commercial and non-commercial configurations into a validated, ready-to-fulfill package. Account information including billing profile is mandatory. Order header and line items directly reflect the quote, maintaining traceability. Commercial modifications require reopening the quote, while non-commercial modifications occur directly in the order. The order is validated before approval.
6. **Order approval**: Upon submission, the order undergoes financial and operational validation before fulfillment begins. Product inventory is created but remains inactive, awaiting successful completion before activation. This ensures inventory records exist but don't affect availability until services are confirmed as deliverable.

7. **Order decomposition**: Order decomposition breaks down the order into executable components for orchestrated fulfillment. Order line items are created for product offerings and product specifications. Domain orders are created for each product specification to enable domain-specific orchestration. Order decomposition generates child orders for order line items and domain orders, creating a hierarchical structure that supports both parallel and sequential fulfillment.
8. **Instantiate sub flows and tasks:** Sub flows are instantiated for every domain order, creating work streams for fulfillment. Tasks are triggered based on flow and decomposition rules. Tasks may be manual, API-driven, Field Service Management for Telecommunications (FSMT) for on-site work, or Strategic Portfolio Management for Telecommunications (SPMT) for complex projects. Processing occurs in parallel with dependencies for proper sequencing, or staggered to optimize resources.

   The workflow branches into two parallel paths for specialized handling of complex scenarios and exceptions.

   - **Instantiate special project**: This path provides specialized handling for orders requiring project management discipline. A project is created with tasks designed for complex fulfillment scenarios, such as large enterprise deployments, multi-site installations, or any orders that require coordinated planning, resource management, and formal project tracking.
   - **Fall out management**: This path handles exception management and resolution. When orders encounter issues, errors, or require special intervention, this path ensures proper tracking, escalation, and resolution without blocking the main fulfillment flow. Problematic orders are managed separately while successful orders continue processing normally.
9. **Order closure**: The final stage consolidates fulfillment by progressively closing tasks at each level, from sub flows to domain orders to the complete order. Once all tasks are complete, the order closes and services are activated. Integration with the Configuration Management Database (CMDB) is established, enabling lifecycle management including monitoring, change control, and incident management.

The Sales CRM for Telecommunications workflow, upon completion, results in activated services ready for customer use, a fulfilled order completing the transaction, CMDB integration for lifecycle management and monitoring, service contracts with defined entitlements, a complete audit trail ensuring compliance, and integrated systems providing end-to-end visibility.

Sales CRM for Telecommunications functional architecture

Sales CRM for Telecommunications is a comprehensive order management solution designed specifically for telecommunications service providers. Sales CRM for Telecommunications serves as a critical orchestration layer within the larger telecommunications ecosystem, integrating with key systems to manage the complete journey from prospect identification to service activation.

Sales CRM for Telecommunications in the Telecommunications ecosystem

Sales CRM for Telecommunications is a critical application in the telecommunications industry, serving as the central orchestration layer for order management. It acts as a central hub connecting various systems across the telecom operator's landscape:

- Customer-facing channels: Mobile apps, web portals, and sales representatives.
- Supporting systems: Product catalogs, inventory systems, and service qualification platforms.
- Fulfillment systems: Field service management and network activation platforms.

Sales CRM for Telecommunications leverages TeleManagement Forum (TMF) industry standards to manage telecommunications orders across both selling and fulfillment phases while integrating with multiple upstream and downstream systems.

Foundation components

Sales CRM for Telecommunications is built on the following core data entities that underpin the entire order management process:

- Account: Customer account information and organizational hierarchy.
- Contact: Customer contact details and relationships.
- Location/Site: Service delivery locations and site information.
- Product Model: Product specifications and definitions created using the Product-Service-Resource (PSR) framework.
- Sold Product: Customer's purchased products and entitlements
- Install base item: Customer's product configuration.
- Entitlements: Entitlements associated with the sold products.
- Contracts: Customer contract including account details and specific assets covered.

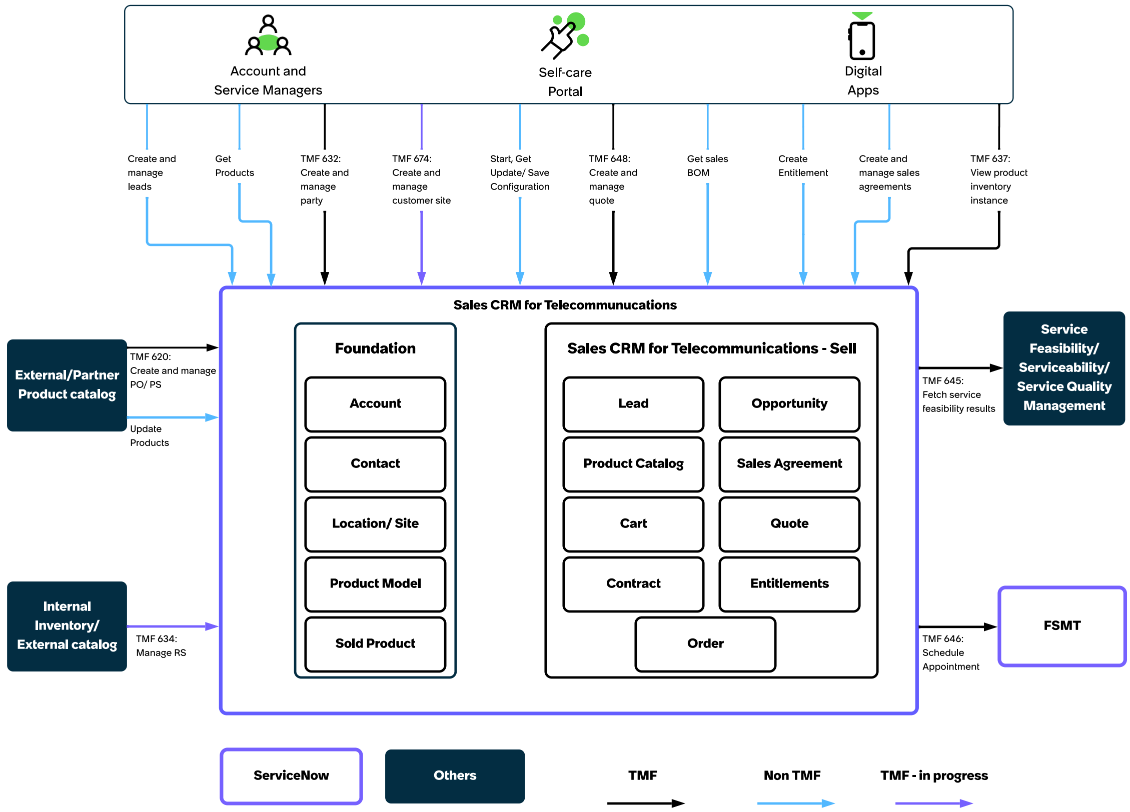
These foundational elements provide the essential data structures that support all operations, from lead management through service activation. The Sales CRM for Telecommunications functional architecture operates across two distinct phases: the Selling Phase and the Fulfillment Phase.

Selling phase

This phase covers the customer acquisition and order capture process:

- Lead Management: Initial prospect identification
- Opportunity Management: Sales opportunity qualification
- Product Catalog: Product offerings and configurations
- Sales Agreement: Pre-sales contractual arrangements
- Shopping Cart: Customer selection management
- Quote: Pricing and proposal generation (CPQ)
- Contract: Post-sales contractual obligations
- Order Capture: Final order submission

During this phase, Sales CRM for Telecommunications integrates with digital apps, self-care portals, account managers, product catalogs, and service feasibility systems.

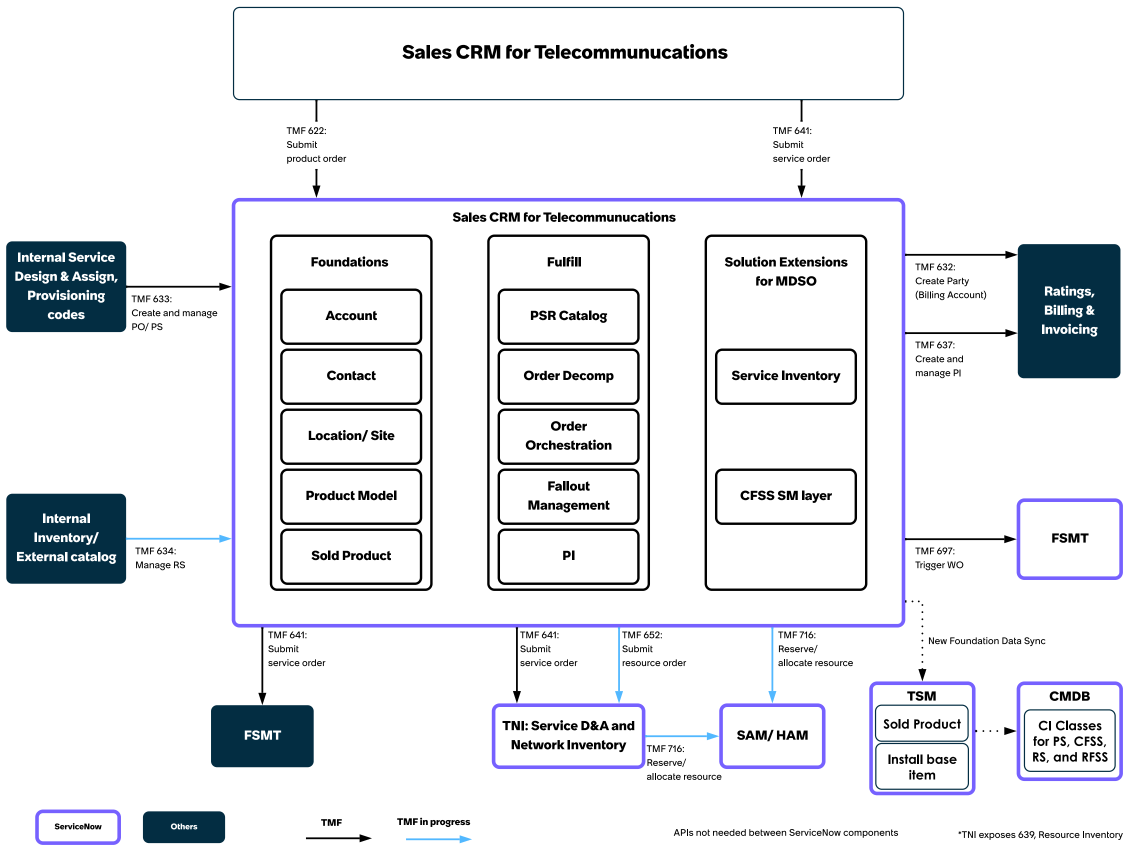


Fulfillment phase

After order submission, the next phase is the fulfillment process:

- Order Distribution: Decomposition into service orders and work orders.
- Service Order Management: Tracking through activation lifecycle.
- Activation Handoff: Submission to provisioning systems.

During this phase, Sales CRM for Telecommunications coordinates with Field Service Management for Telecommunication, external inventory systems, and network activation platforms.



Note: Sales CRM for Telecommunications orchestrates the order management process and submits service orders to downstream activation systems but does not perform network activation or provisioning.

TeleManagement Forum (TMF) Open APIs

The Sales CRM for Telecommunications leverages TeleManagement Forum (TMF) Open APIs throughout its architecture, ensuring standards-based integration with third-party systems. Key API integrations include:

- Product catalog management API: Manage product catalog information from external systems. See Product Catalog Open API.
- Product inventory API: For ServiceNow applications or external CRM / CPQ submitting orders. See Product Inventory Open API.
- Service catalog API: For synching technical specifications with other network domain specific provisioning catalogs. See Service Catalog Open API.
- Service order API: Use when a customer order is handled by another application and Sales CRM for Telecommunications acts as a service order manager. Also use when the marketplace owner handles decomposition and orchestration and sends the order to Sales CRM for Telecommunications for fulfillment. See Service Order Open API.
- Technical service qualification API: Checks availability of resources and services before an order is submitted for fulfillment. See Technical Service Qualification Open API.
- Quote management API: Based on the TMF 648 API. See Quote Management API.

Non-TMF APIs

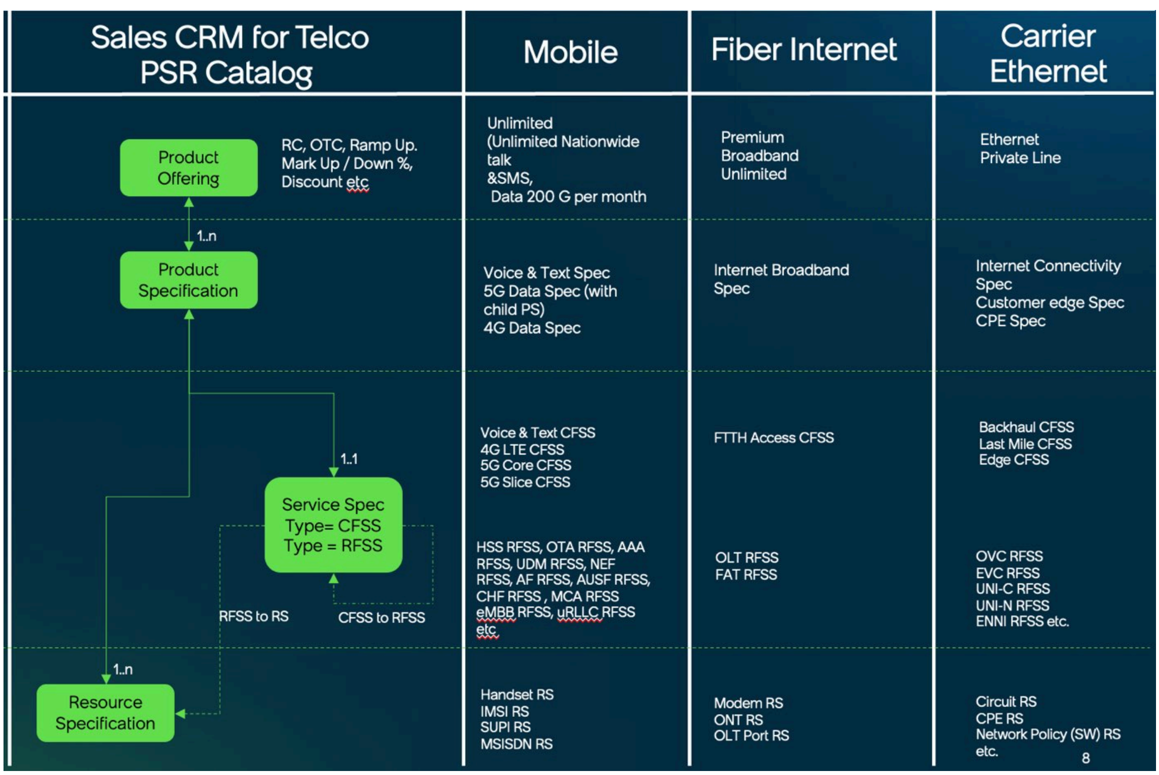
- Entitlement API: Create and fetch entitlements. See Entitlement API.
- Lead management API: Mapping and certification as per TMF 699. See lead API.
- Order API: See Order API.
- Sales agreement API: See Sales Agreement API.

Sales CRM for Telecommunications PSR catalog

The Sales CRM for Telecommunications Product, Service, and Resource (PSR) catalog is a unified catalog that defines all required entities in a single location, based on the TM Forum (TMF) Shared Information and Data (SID) model.

The Sales CRM for Telecommunications PSR catalog consolidates product, service, and resource definitions into a single catalog structure, eliminating the need for product data synchronization between separate sales and fulfillment catalogs. It provides a consistent framework for managing telecom product offerings across multiple domains like B2C Retail Mobile, B2C Retail Wireline, B2B Enterprise Connectivity, and Beyond Connectivity. The following table contains examples of Mobile, Broadband and Dedicated leased lines.

Because the catalog defines and maps all necessary entities in one place, you don't need explicit entity-to-entity API mapping or separate product data harmonization across sales and service catalogs.



PSR catalog hierarchy

Each level in the catalog maps to a specific layer of the product-service-resource model:

- Product offering: Defines the item to be sold to a customer. Pricing attributes include recurring charges (RC), one-time charges (OTC), ramp-up pricing, mark-up and mark-down percentages, and discounts. A product offering references a product specification which in turn can have child product specifications.

- Product specification: The structured definition of a product. One product specification maps to exactly one service specification and can reference one or more resource specifications.
- Service specification: Defines the service layer. Service specifications are of two types:
  - CFSS: Represents the service provided to the customer, for example, Voice and Text CFSS or home fiber FTTH Access CFSS.
  - RFSS: Represents the underlying network resource services that are used to deliver service to the customer, for example, Home Subscriber Server (HSS), RFSS or Optical Line Terminal (OLT) RFSS.
- Resource specification: Defines the physical or logical network resources that fulfill the service, for example, IMSI or Modem RS.

Commercial features

The PSR catalog supports the following commercial capabilities:

- Product bundling and hierarchy: Supports product offer grouping, product offer-to-product specification definitions, and product specification hierarchies with relationships between specifications.
- Product offer pricing rules: Supports multiple pricing rule types, including recurring charges, one-time charges, ramp-up pricing, mark-up pricing, mark-down pricing, contract-based pricing, and characteristic value-based pricing.
- Multidimensional rules and relationships: Supports product offer-to-product offer relationships, product offer-to-product specification relationships, specification-level relationships, characteristic value-based rules, and context-based rules such as location and customer type.

Fulfillment features

The PSR catalog supports the following order fulfillment capabilities:

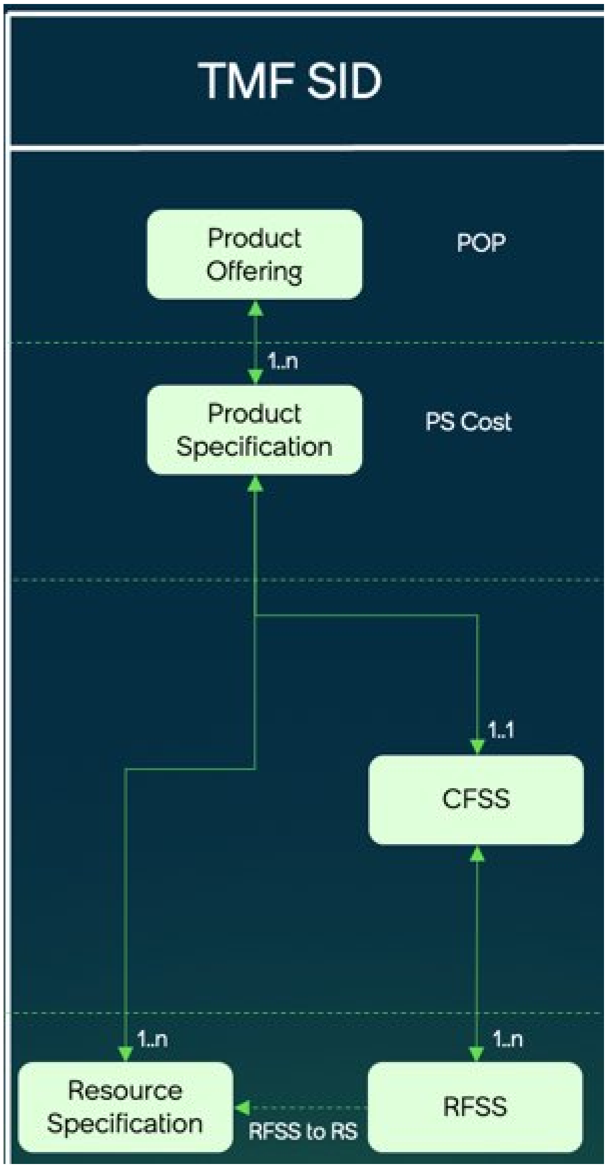
- Catalog-based decomposition: Decomposes a customer order into order line items based on product offerings and product specifications. Order line items are further decomposed into child or domain orders, such as product orders, service orders, and resource orders.
- Quote data carry-over into orchestration: Maps attributes from the quote through to order tasks, making the correct data available to southbound APIs during service order orchestration.
- Orchestration dependencies: Supports staggered decomposition based on catalog characteristic values and decomposition rules. This eliminates complex workflow rules when order line items have dependencies on each other.

Mapping of Sales CRM for Telecommunications PSR catalog to TMF SID

The Sales CRM for Telecommunications PSR catalog entities, product offering, product specification, customer facing service specification, resource facing service specification, and resource specification map directly to the corresponding entities in the TM Forum (TMF) shared information and data (SID) model.

TMF SID model

The TMF SID model is an industry-agreed framework by TM Forum that provides a common language and data model for communications service providers (CSPs). It defines business entities such as customer, product, service, and resource and their relationships across enterprise systems. The Sales CRM for Telecommunications PSR catalog maps its core entities to the product, service, and resource layers of the TMF SID model. The TMF APIs that the catalog supports, including TMF 620 and TMF 633, are also based on the SID model.



Product offering

A product offering defines how a product specification is made available to the market, including its pricing, terms, and conditions.

- Market view: Represents the commercial view of a product that customers see in a catalog and agree to contractually.
- Relationship to product specification: References a product specification to define what is being sold. One product specification can have multiple product offerings, for example, the same product can be offered with different price points for different time periods.
- Components: Can be structured as a simple item or a bundle of other product offerings.
- Commercial parameters: Includes price, market segments, valid dates, and allowed actions such as subscription or upgrade.
- Catalog management: Categorized in a catalog and can be constrained so that it is sold only within a bundle.

Bundle product offering

A bundle product offering is a type of product offering that groups two or more product offerings into a single package. Unlike a simple product offering which represents a single, atomic item such as a mobile handset, a bundle product offering represents a combination of offerings, such as a triple play package (internet, TV, and voice).

- Inheritance: Inherits all attributes of a standard product offering.
- Composition: Can contain other bundle product offerings or simple product offerings, supporting hierarchical, multi-level bundling.
- Reusability: References simple product offerings rather than embedding them, so the same component can appear across different bundles.
- Pricing and marketing: Supports bundle-specific pricing, price adjustments, and rules such as eligibility, compatibility, and commitment terms.
- Containment: Indicates whether a product offering represents a single item or a collection.

Product specification

A product specification is a detailed description of a tangible or intangible object that serves as the template from which customer products and subscriptions are instantiated.

- Commercial focus: Represents the product as perceived by business users, not as technical network components.
- Structure: Can be simple (atomic) or a composition of other product specifications.
- Attributes: Includes characteristics such as color, relationships with other specifications, and characteristic values.
- Realization: Realized through customer-facing service specifications (CFSS) and resource-facing service specifications (RFSS).
- Lifecycle: Manages the product lifecycle status.

Resource specification

A resource specification defines the characteristics, behaviors, and relationships of a managed or unmanaged resource, and serves as the template for instantiating specific resource instances of the same type.

- Template functionality: Defines the resource type. The resource class defines a specific instance based on that specification.
- Definition scope: Captures common attributes such as name, version, and lifecycle status, along with physical or logical parameters that apply to all instances of a resource type.
- Resource types: Can describe physical components such as a router or SIM card, or logical components such as software or virtual network functions.
- Service realization: Defines the technical components that RFSS requires to deliver a service.

Customer-facing service specification

A customer-facing service specification (CFSS) defines technology-agnostic service characteristics that a customer directly purchases. It connects product specifications to resource-facing service specifications, focusing on service parameters, service level agreements (SLAs), and features.

- Customer-centric view: Describes services from the customer's perspective, for example, internet access rather than a specific DSL or fiber profile.
- Product realization: Represents the realization of a product specification.
- Service components: Includes service characteristics such as service name and service rate, parameters that customers can configure during ordering, and links to related product offerings.
- Structure: Can be atomic (single) or composite (a grouping of services).
- Product offering support: A single CFSS can support multiple similar product offerings.

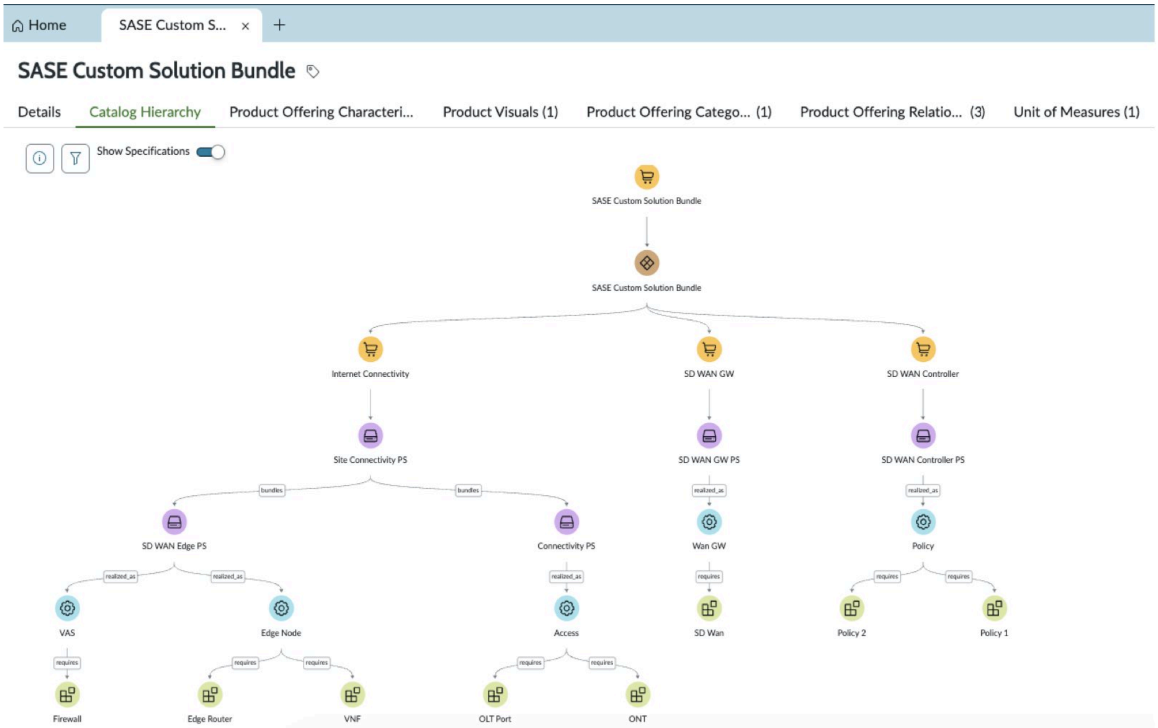
Resource-facing service specification

A resource-facing service specification (RFSS) defines the technical characteristics, attributes, and requirements of a service that maps to underlying resources. Unlike a CFSS, an RFSS is domain-specific or technology-specific.

- Definition and purpose: Defines the technical implementation of a service and serves as the blueprint for managing the lifecycle of resource-facing service instances.
- Relationship to resource-facing service: Serves as the specification used to instantiate actual resource-facing service instances.
- Technology specific: Represents reusable, technology specific components such as DSL, VPN, or MPLS connections to network infrastructure.
- Structure: Can be atomic or composite (containing other RFSSs) and defines relationships with physical or logical resources such as routers and IP addresses.
- Mapping: Maps a logical service requirement from the CFSS layer to the network resources needed to deliver it.

Product definition in the Sales CRM for Telecommunications catalog

The following example shows how the SASE Custom Solution Bundle is defined in the Sales CRM for Telecommunications catalog. The bundle product offering contains three child product offerings, internet connectivity, SD WAN GW, and SD WAN Controller each of which is linked to its own product specification. The product specifications are mapped to service specifications. For example, Site Connectivity PS is mapped to SD WAN Edge and Connectivity service specifications, which in turn require resource specifications such as Edge Router, VNF, OLT Port, and ONT.



Configuring Sales CRM for Telecommunications

Set up the Sales CRM for Telecommunications application so that your agents can work on various stages of the product sales life cycle, such as sales opportunities, quotes, order capture and fulfillment, contracts and entitlements, and also the basic product catalog and pricing features used by each application.

To learn about how to install and configure a set of Sales CRM for Telecommunications applications, see the following:

Applications	Description
Activate Sales CRM for Telecommunications	Activate the Sales CRM for Telecommunications plugin for Sales CRM for Telecommunications if you have the admin role. The application includes demo data and activate related ServiceNow® Store applications and plugins if they aren't already installed.
Install and configure Lead Management	It enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs.
Install and configure Opportunity Management	It enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.
Configure Sales Forecasting	Use the Sales Forecasting application to project your future sales volumes and revenue

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Applications	Description
	based data from opportunities and pipeline analysis.
Configuring product offerings and catalogs	Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.
Configuring product pricing	Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings.
Configuring location-based product transactions	In Sales Customer Relationship Management, agents can create opportunities, quotes, and orders tailored to customer location. These transactions are called location-based product transactions.
Configuring CPQ Configurator	Plan and configure your implementation of the CPQ Configurator. Product catalog admins and agents run CPQ Configurator in the CSM Configurable Workspace, while customers using self-service features use it in the Business Portal.
Configuring Quote Management	Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.
Configure Sales Agreement Management	Use the Sales Agreement Management application to create sales agreements between a buyer and a seller for future transactions.
Install and configure Lead to Cash Core	It enables you to compose and build workflows that your organization maintains for the life cycle of a sold product.
Configuring Customer Engagement Sequences	Plan and configure your implementation of Customer Engagement Sequences.
Configure order fulfillment	Order fulfillment is the process for fulfilling customer orders by using Workflow Studio. Order fulfillment, also referred to as order orchestration, defines how to coordinate the fulfillment of orders.
Configure order enrichment flows using Decision Tables	Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.
Configuring Jeopardy Management	You can configure Jeopardy Management to monitor tasks in a fulfillment plan and alert managers about the jeopardy levels.

Applications	Description
Configuring Fallout Management	As a provider, you can use Fallout Management to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.
Configuring Order Management for Service Exchange Consumers	As a customer, you must complete some configuration tasks so that you can set up the Order Management application.
Managing post-fulfillment order changes	Efficiently handle a variety of post-fulfillment changes to maintain service quality and operational accuracy after initial order fulfillment. These changes include canceling, suspending, resuming, disconnecting, and modifying orders. Each change type has distinct workflows, dependencies, and impacts on inventory and service states.
Asynchronous order processing for large customer and consumer orders	Asynchronous order processing handles high-volume enterprise and consumer orders without waiting for immediate processing, improving system performance for communications service providers (CSP) using Order Management.
Configuring order priority and routing	As a provider, you can configure various parameters to prioritize and route orders to ensure that they are fulfilled on time.
Integrating Order Management with southbound external systems	If you have a Telecommunications Service Management subscription, you can submit outbound service order requests to various external systems by integrating the Order Management application with the external southbound systems.

Activate Sales CRM for Telecommunications

Activate the Sales CRM for Telecommunications plugin for Sales CRM for Telecommunications if you have the admin role. The application includes demo data and activate related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Confirm that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sales CRM for Telecommunications application and child applications using the filter criteria and search bar.

You can search for the application by its name or ID. If you can't find the application, you may have to request it from the ServiceNow Store.

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. In the Application installation dialog box, review the application dependencies.

   All dependent plugins and applications that are included, or must be installed are listed in the dialog box.

4. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

5. Select **Install**.

Configuring product offerings and catalogs

Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

As a product catalog administrator or catalog manager, you complete various configuration tasks to create the product catalogs and offerings for products and services sold by your organization. You also work with your pricing administrator, who sets the pricing for your product offerings. For more information on pricing, see Configuring product pricing.

Overview of product offering and catalog configuration

You can use the CSM Configurable Workspace to configure product offering catalogs, product offerings, and product offering relationships.

The following table identifies the configuration tasks for setting up the various features available in Product Catalog Management.

Product offering and catalog management configuration tasks

Configuration task	Description
Create a product offering catalog	Create a catalog, which is the top-level entity in the catalog hierarchy. Catalogs can have categories, and categories can have subcategories or product offers.
Create a product offering category	Define a product offering category used to organize similar product offerings in a catalog. Catalog categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders.
Create product characteristics and characteristic options	Define the specific attributes, properties, and options that distinguish a product offering, influencing its configuration and pricing.

Product offering and catalog management configuration tasks (continued)

Configuration task	Description
Create product offerings	Configure and add product offerings to catalogs and categories. Once published, product offerings are available to Sales Customer Relationship Management agents as they create opportunities, quotes, and orders.
Add product visuals	Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders.
Create product offering relationships	Create product relationships to bundle products and services together to streamline the order process. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles also let you offer special bundle pricing.
Control cascading quantity values in child product offerings	Control how the quantities for child line items in a product offering for a quote or order are calculated by using the `sn_prd_pm.enable_cascade_quantity` system property.
Add related contracts to product offerings	Add related contracts to your product offerings in the Sales Customer Relationship Management application.
Add a unit of measure to a product offering	Add a unit of measure (UOM) to a product offering in Sales Customer Relationship Management.
Create a product offering version	Create a product version to add updates to a published product offering.
Create product offering relationship groups	Combine bundles of product offerings into related groups in Sales Customer Relationship Management.
Configure needs analysis	Create needs templates, which are questionnaires from product selection guides that your agents use to determine what product offers can be added to opportunities.
Configure product offering recommendations for quotes	Create offer recommendations that sales agents can use to complement or supplement items in their quotes.
Export and import product catalog entities	Export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance.
View product offering hierarchy and associated specification hierarchy	View the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.
Configure product offer eligibility	Filter the product catalog, product categories, and product offerings dynamically, to display only eligible product offerings for a customer in the product catalog.

Create and publish resource specifications

Create and publish a base version of a resource specification to define all the resource options for a customer-facing product that you sell and to designate how to fulfill these options.

Before you begin

Create characteristics, characteristic options, and specification categories. To learn more about characteristics, characteristic options, and specification categories, see:

- Create product characteristics and characteristic options
-

Role required: sn_prd_pm.product_catalog_manager

About this task

You create a resource specification to define the technical information for a resource, which includes the following:

- All the specification characteristic options that are available for a resource, and how they should be fulfilled.
- Various categories of information, such as the manufacture, model, and brand-related information about a resource, including the resource visuals and activation guides. Resource specifications aren't customer-facing.
- Its relationship to other product, service, and resource specifications. You can enable the product and service delivery by using the required resource.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** > **Resource specifications**.
3. Select **New**.
4. On the Details tab, fill in the fields.

Create Resource Specification

Field	Description
Number	Auto-generated ID for the resource specification.
Name	Name of the resource specification.
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display name	Name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is

Field	Description
	usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears but can be overwritten.
Category	Specification category that the resource specification belongs to.
Type	Type of resource specification. Select a type: ◦ Physical:Physical item, such as a router or a handset. ◦ Logical: Logical item, such as an IP address.
Start date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and isn't used for actual processing.
End date	Date through which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and isn't used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Select the search icon to choose the person.
Description	Description for this resource specification.
State	State of the resource specification. ◦ Draft: Unpublished draft resource specification that is assigned when you first create the specification record. ◦ Published: Published resource specification that is assigned when you formally publish it for use in a product offering. ◦ Retired: Resource specification that is retired and can no longer be used to create another specification version. ◦ Archived: Resource specification that is no longer used in the ordering or fulfillment process.
External code	Product code of the specification.
Line	Product line of the specification.

Field	Description
Cost to company	Cost to the company for this resource specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the resource specification is a parent that contains multiple child specifications.
Installation required	Option indicating that someone must install the product on site.
Location specific	Option indicating that this resource specification requires the location details for fulfillment and installation.
Transient	Option that indicates the product for this resource specification is for one-time use. **Note:** If you select this option, the sold product or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of a transient product.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here You can't change this field.

5. Select **Save**.
The resource specification is created. The following tabs open for defining and viewing related information for the specification:

Resource specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications.

Tab	Description
	Use the **Show specification** toggle to view the hierarchy of specifications.
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications
Versions	Create another version of the specification

6. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Create and publish service specifications

Create and publish a base version of a service specification. A service specification defines all the service options that apply to a customer-facing product you sell, and designates how to fulfill these options.

Before you begin

- Create the characteristics and characteristic options for your product offerings
-

Role required: sn_prd_pm.product_catalog_manager

Role required: admin

About this task

You create a service specification to define a service and the technical information for that service, which includes:

- All the specification characteristic options that are available for a service, and how they should be fulfilled.
- Various categories of information, including the cost, terms and conditions, and service-related materials. These resources include the service-related visuals and implementation guides. Service specifications can be customer-facing or resource-facing.
- Its relationship to other product, service, and resource specifications.

Procedure

1. Navigate to **Specifications** > **Service Specifications**.
2. Select **New**.
3. On the Details tab, fill in the fields.

Service Specification

Field	Description
Number	Auto-generated ID for the service specification.
Name	Name of the service specification.
Version	Version number that is assigned to a specification: ○ When you create the initial version, 1 appears in this field, and can't be changed. ○ When you create subsequent versions of the specification, the next incremental number appears in this field after you select **Create New Version**. For example, 4 appears in this field if 3 was the previous version number.
Display name	Display name that appears for the specification when this version of the specification is in effect. ○ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ○ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten.
Category	Specification category that the service specification belongs to. ○ If the selected category that belongs to 5G services doesn't have any matching slice templates, the system checks for existing templates.

Field	Description
	◦ If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification.
Type	Type of service specification: **Customer Facing** Customers can create a ticket or a case for the service. When you select this type, the **Distribution channel** field is displayed to specify how the service is provided, for example web. **Resource Facing** Services are required for a resource to function properly. **Not Applicable** Service specification is not customer facing or resource facing.
Sub type	Sub-type of the specification. Choose **Slice** to define 5G network service specifications. **Note:** ◦ When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table. ◦ If you select None as the sub type, you can manually specify a template.
Start date	Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It's informational only and isn't used for actual processing.
End date	Date up until which the specification is valid. Use this field when you create a version to indicate when it's no longer in effect. It is informational only and isn't used for actual processing.
Template	Templates that you have defined if you're using 5G services.

Field	Description
	Note: When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics according to the new template that you have selected.
Description	Description for the service specification.
State	State of the service specification. **Draft** Unpublished draft service specification that is assigned when you first create the specification record. **Published** Published service specification that is assigned when you formally publish it for use in a product offering. **Retired** Service specification that is retired and can no longer be used to create another specification version. **Archived** Service specification is no longer used in the ordering or fulfillment process.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as distribution channel.
External code	Service code of the specification.
Line	Service line of the specification.
Cost to company	Cost to the company for this service specification. This field is for profit-calculation purposes only.

Field	Description
Composite	Option indicating that the service specification is a parent specification composed of multiple child specifications.
Installation required	Option indicating that someone must install the service on site.
Location specific	Option indicating that this service specification requires the location details for fulfillment and installation.
Transient	Option that indicates the product for this service specification is for one-time use. **Note:** If you select this option, the sold product and or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Delete (MACD) actions can't be performed on the sold product or product inventory records of transient products.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

4. Select **Save**.
The service specification is created. The following tabs open for defining related information:

Service specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications. Use the **Show specification** toggle to view the hierarchy of specifications.

Tab	Description
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.
Versions	Create another version of the specification.

5. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Create and publish product specifications

Create and publish a base version of a product specification. A product specification defines all the product options that apply to a customer-facing product you sell, and designates how to fulfill these options. It contains information such as the product description, pricing, eligibility, and product options.

Before you begin

- Create the product characteristics and characteristic options for your product offerings
-

Role required: sn_prd_pm.product_catalog_manager

About this task

A product specification defines a product that you sell to your customers. It captures the various characteristics of a product, and includes:

- All the specification characteristic options that are available for a product, and how they should be fulfilled.
- Various categories of information, such as the brand, cost, terms and conditions, and product-related materials, which include product visuals. Product specifications are customer-facing and are added to product offerings.
- Its relationship to other product, service, and resource specifications, and how a customer order of a product offering is delivered.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** > **Product Specifications** and select **New**.
3. On the Details tab, fill in the fields.

Create Product Specification

Field	Description
Number	Auto-generated ID for the product specification.
Name	Name of the product specification.
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display name	Name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears but can be overwritten.
Category	Specification category that the product specification belongs to.
Type	Type of product specification. Select a type: ◦ Goods:Product specification for the type of goods that you sell. ◦ Network: Product specification of a network. ◦ Service: Product specification of a service that you sell or provide to your customer.
Start date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is

Field	Description
	informational only and isn't used for actual processing.
End date	Date through which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and isn't used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Select the search icon to choose the person.
Description	Description for this product specification.
State	State of the product specification. ◦ Draft: Unpublished draft product specification that is assigned when you first create the specification record. ◦ Published: Published product specification that is assigned when you formally publish it for use in a product offering. ◦ Retired: Product specification that is retired and can no longer be used to create another specification version. ◦ Archived: Product specification that is no longer used in the ordering or fulfillment process.
External code	Product code of the specification.
Line	Product line of the specification.
Cost to company	Cost to the company for this product specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option indicating that someone must install the product on site.
Location specific	Option indicating that this product specification requires that you enter the location details into a customer order for fulfillment and installation.
Transient	Option that indicates the product for this product specification is for one-time use.

Field	Description
	Note: If you select this option, the sold product or product inventory record for the transient product is set to an Inactive state when the order is completed. Move, Add, Change, Disconnect (MACD) actions can't be performed on the sold product or product inventory records of a transient product.
Initial version	Name of the base version of the specification that appears but can't be changed.
Previous version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here You can't change this field.

4. Select **Save**.
The product specification is created. The following tabs open for viewing or defining information related to your product specification.

Product specification tabs

Tab	Description
Catalog Hierarchy	View the complete hierarchy of a product offering and any associated specifications. Use the **Show specification** toggle to view the hierarchy of specifications.
Specification Characteristics	Associate the characteristics and characteristic options with your specification.
Specification Relationships	Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications
Product Offerings	Create a product offering from the specification. For details, see Create product offerings.
Attribute Mappings	.
Versions	Create another version of the specification.

Tab	Description
Compatibility Rules	Configure compatibility rules for horizontal relationships between the specifications of multiple products, services, or resources.

5. When you are finished creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product offering. ○ When you publish it, its state changes from Draft to Published. ○ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product offering.
Copy	Copy the data in this specification so that you can create a specification from it.

Defining mappings for attribute value propagation to domain orders

By defining attribute-mapping rules between two specifications in the product catalog, your fulfillment agents can access all relevant characteristic values in your product, service, and resource orders.

Attribute mapping overview

Orders, for example telecommunications orders, contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Order Management automatically propagates and transforms the characteristics and characteristic values throughout the order fulfillment process. This automatic propagation of attributes across the product, service, or resource orders help to improve your operational efficiency and eliminate errors in the fulfillment process.

Note: Attribute values are another name for order characteristic values.

When value attribute values are assigned and how they're used

Orders contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Multi-site enterprise orders contain various attributes that are related to customer, product, service, and resource information. The ServiceNow AI Platform populates these attributes with the corresponding values at the different stages of the order life cycle.

The ServiceNow AI Platform decomposes orders and order line items into various suborders (product, service, and resource orders) and assigns them to different user groups and users. Different user groups then work with the various suborders to complete the required fulfillment tasks for a given order.

Catalog-driven attribute mapping and value propagation

The order fulfillment flow needs prior information on how specification characteristics are mapped and associated so that the characteristics are propagated from one domain order to another domain order. If you're a product catalog manager, you can define rules-driven attribute mappings between and among selected product, service, and resource specifications. When you define attribute mappings, validations run to verify that they're unique, don't conflict with each other, or conflict with defined specification relationships and decomposition rules.

To learn more about specification relationships, see Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.

The Order Management application executes attribute mappings during the order fulfillment process and sets and propagates order characteristic values across the various suborders.

The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

With catalog driven rule-based attribute propagation, your fulfillment agents have all the relevant and correct information that they require to work effectively on order tasks. The attribute-mapping functionality reduces errors and improves efficiency in the order fulfillment process as follows:

- Without rules-driven attribute mapping, your users have to assign the attribute values manually, which can be error-prone and time-consuming.
- These values propagate to lower domain orders and are used for inventory creation, service activation, and account and billing updates. Fixing an error takes a significant amount of effort and time for your users when these values are manually assigned.
- Attribute mappings promote the proper flow of crucial data through the associated domain orders. This mapping makes consistent data available to users with different roles when they're processing an order.

Define domain order attribute mappings

Create rules-driven attribute mappings to define the relationships and associations between and among product, service, and resource specifications, and how attribute values propagate between these mappings.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

Attribute propagation enables you to define attribute mappings by setting mapping rules to do the following actions:

- Set target and source mapping rules using conditions based on selected characteristics and characteristic options, including complex characteristics.
- Define the attribute mapping from any specification to any other specification that is available in the product and service hierarchy. These selections include siblings and horizontal relationships.
- Designate the same characteristic and characteristic options in both the source and target specifications, including complex characteristic hierarchies.

- Select different characteristics and characteristic options in the source and target specifications, including complex characteristics.
- Select a higher-level specification and lower-level specification, or a lower-level specification and a higher-level specification, in a product offering.

Note: If you create specification relationships and accompanying decomposition rules, the ServiceNow AI Platform performs the required validations when you attempt to create attribute mappings. These validations ensure that your attribute mappings are unique and don't adversely impact existing decomposition rules. To learn more about specification relationships and decomposition rules, see Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications.

If a decomposition rule depends on an attribute-mapping rule, the order decomposition process isn't able to decompose the order because it's waiting for the attribute-mapping rule to provide the characteristic value that is required for order decomposition. The following warning appears when you save a decomposition or an attribute-mapping rule that would cause a dependent relationship with an adverse impact:`Attribute mapping rule impacts decomposition rule in {0} specification for {1} characteristic. Update this record to eliminate this rule dependency.`

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Specifications** and select a specification type.
   - Product Specifications
   - Service Specifications
   - Resource Specifications

   A list of specification records is displayed.
3. Select a record you want to modify.
4. Navigate to the **Attribute Mappings** tab.
5. Select **New**.
6. On the form, fill in the fields.

Create Attribute Mapping form

Field	Description
Number	System-generated attribute mapping number.
Target specification	Target specification that you're associating with the selected source specification and related source characteristics, and source characteristic options.
Target rule	Name of the target rule, displayed after you create the mapping rules.
Source rule	Name of the source rule, displayed after you create the mapping rules.
Source specification	Source specification that contains the source characteristics and characteristic options to associate with the selected

Field	Description
	target specification, characteristics, and characteristic options. Based on your selection, this field auto populates the **Available columns** section with the characteristics of your selected product, service, or resource specification.
Available columns	Displays one or more source characteristic options from the source specification, if available. Select the characteristics to be propagated. The characteristics display in the **Selected columns** section.

7. In the Conditions section, use the condition builder to specify one or more conditions using the characteristics and characteristic options selected in the Available columns for the source rule.
8. Select **Save**.
9. In the Available columns section, choose the target characteristics to be used as action variables in your target rule.
10. In the Actions section, select **New**.
    Fill in the dialog box to define the Configuration Rule Action.

Configuration Rule Action

Field	Description
Rule	Target rule for the attribute mapping, identified by a system-defined alpahnumeric number for the mapping.
Action variable	The target characteristic to be used in the rule action. In the field, select a characteristic.
Action type	Rule action to be performed. Select the type applicable to attribute mapping: ◦ Defaulting: Preselects a characteristic, option, or value, based on conditions that you specified for the target rule. ◦ Exclusion: Excludes certain characteristics from the configuration because they're not applicable or invalid depending on other selections made. ◦ Inclusion: Enforces the selection of certain characteristic options in a given product configuration. ◦ Set value: Set the quantity on a characteristic value on a non-choice characteristic in the product configuration. ◦ Validation: Checks one or more conditions
Action	The action to be performed for a particular characteristic. Select the field to list the

Field	Description
	available actions for the elements, such as characteristics. For example, you can: ◦ Copy characteristic from source ◦ Select s characteristic option ◦ Deselect a characteristic ◦ Enable or disable a characteristic or characteristic option
Variables	Source characteristic that you select.

11. Select **Save**.

Result
The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

What to do next
Create and publish your offerings to a product catalog.

Create specification relationships, quantity mapping, and decomposition rules for Sales CRM for Telecommunications

Create the specification relationships and optional decomposition rules that define the associations between the product, service, and resource specifications for a product that you offer. These relationships impact how an order is fulfilled for a customer.

Before you begin
Role required: sn_prd_pm.product_catalog_manager

About this task
Specification relationships define the relationships and associations between the product, service, and resource specifications. They designate how an order that contains the source specification is decomposed, fulfilled, and delivered to the customer. For example, if you have a product that you deliver through a service specification, you can designate that it is composed of three unique service specifications (product, service, or resource).

Note: The target product, service, or resource specification you select in the **Target Specification** field can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.

You can also select the characteristic options of the quantity characteristic for the specification relationship to provide the quantity of the target specifications. The order decomposition process refers to the mapped quantity to decompose the order for the source specification and creates the required number of domain orders for the target specification.

Optionally, you can create decomposition rules for the selected source and target specification relationships. The specification relationships can have product, service, or resource specifications as the source specifications.

Note: To learn more, see Order decomposition.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Specifications** and select a specification type.
   - Product Specifications
   - Service Specifications
   - Resource Specifications

   A list of specification records is displayed.
3. Select a record you want to modify.
4. Navigate to the **Specification Relationships** tab.
5. Select **New**.
6. On the form, fill in the fields.

Specification Relationship form

Field	Description
Source specification	Product, service, or resource specification that you create the relationship from.
Target type	Type of specification: ◦ Product Specification ◦ Service Specification ◦ Resource Specification
Target specification	The target product, service, or resource specification you select can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.
Mandatory	Option that designates if the relationship between the selected source and target specifications is mandatory and should always exist when a customer orders the product. ◦ If selected, the target specification is always included with the source specification. During the ordering process,you must select the characteristics and characteristic values for the target specification. ◦ If cleared, it is an optional target specification and is only included with the product if the customer selected it during the ordering process.
Relationship type	Type of relationship that designates how an order that contains the source specification decomposes for fulfillment after you receive and approve it.

Field	Description
	○ **Composed of** is applicable for following specification: ▪ If the source specification is product specification and selected target is product specification. An order that contains the source specification and characteristics decompose into a single service order. ▪ If the source specification is service specification and selected target is service specification. ▪ If the resource specification is source specification and selected target is also resource specification. ○ **Realized as** is applicable for following specification: ▪ If the source specification is product specification and selected target is service specification. ▪ If the source specification is service specification and selected target is service specification. ○ **Bundles** is applicable for following specification: ▪ If the source specification is product specification and selected target is product specification. An order that contains the source specification and characteristics decompose into unique order line items for each of the target specifications bundled from that parent product specification. ▪ If the source specification is service specification and selected target is service specification. ▪ If the resource specification is source specification and selected target is also resource specification. ○ **Requires** is applicable for following specification: ▪ If the product specification is product specification and selected target is resource specification. To enable the delivery of the promised services in the specification, an order

Field	Description
	that contains the source specification and characteristics also requires the target resource specification. ▪ If the service specification is service specification and selected target is resource specification.
Order	Enter a numeric value that represents the order in which this relationship is applied, if there is more than one relationship.
Minimum quantity	Required minimum number of specifications for an order.
Default quantity	Default quantity if there is no selected amount.
Maximum quantity	Maximum quantity of specifications.
Quantity characteristic	Source specification characteristic that is used for quantity mapping. The quantity characteristic is supported only for a specification relationship in a product specification.

7. Select **Save**.

What to do next

Optionally, create decomposition rules for selected specification relationships that have a product, service, or resource specification as the source specification. For more information, see:
.

Configuring compatibility rules for horizontal relationships

As a provider, you can use compatibility rules to establish horizontal relationships between the specifications of multiple products, services, or resources.

You use a compatibility rule to define a source specification and a target specification and to establish a relationship between them.

The ServiceNow AI Platform provides two types of relationships that you can use to define a compatibility rule:

1. Requires: The source specification requires the defined target specification.
2. Excludes: The source specification excludes the defined target specification.

While you're creating a compatibility rule, you can establish the horizontal relationship either by defining the specifications or by defining the details for the specification characteristics. You can also define the maximum and minimum quantity of the specifications to support and fulfill your customer orders according to the defined decomposition rules.

Before you can capture a new customer order that has a horizontal relationship, you must configure the compatibility rules by defining the source and target specifications. To learn more, see:

-
- Define the source specifications in the compatibility rules
-

Create a compatibility rule

Create a compatibility rule in the product catalog to define the horizontal relationships between your product, service, and resource specifications.

Before you begin

Role required: sn_prd_pm.product_catalog_manager, sn_prd_pm_adv.catalog_creator

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Rules** > **Compatibility Rule**.
3. Select **New**, and then fill in the fields.

Create Compatibility Rule form

Field	Description
Number	System-assigned number for the compatibility rule.
Name	Name of the compatibility rule.
Description	Description of the compatibility rule.
State	State of the compatibility rule: **Draft (Default)** Unpublished draft compatibility rule that is created when you fill in the fields and submit the compatibility rule. **Published** Published compatibility rule that is created when you formally publish it after defining the source and target specifications for a product, service, or resource. **Note:** Only published compatibility rules are considered for the order capture and fulfillment process. **Archived** Compatibility rule that is no longer used in the product catalog.
Rule	Name of the compatibility rule based on the source configuration. Displays when the rule is saved.

4. In the Source Configuration section, select the product specification to be the source of the compatibility rule.

5. In the Available columns section, select the characteristics.
   The selected characteristics are displayed in the Selected columns section.
6. Select **Save**.
7. In the Conditions section, use the condition builder to create one or more conditions to specify the characteristic options used in the compatibility rule.
8. Select **Save**.

What to do next

.

Define the source specifications in the compatibility rules

Define a source specification in a compatibility rule so that you can create a horizontal relationship in your product catalog.

Before you begin

Ensure that you have created a compatibility rule. To learn more, see Create a compatibility rule.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

About this task

A source specification record includes the details of a source product inventory item in the compatibility rule. After you create a compatibility rule, you can configure the characteristics of your source specification.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Compatibility Rule**.
2. In the Compatibility Rules list, select the compatibility rule that you want to define the source specification for.
3. On the form, select the Source Configuration related list.
4. Select **New** and fill in the fields.

Specification Configuration form

Field	Description
Specification	Based on the specification that you selected when you created the compatibility rule, this field auto-populates with your product, service, or resource specification.
Characteristic	Characteristic to define the source specification in the compatibility rule. Select the characteristic that is associated with the product, service, or resource specification.
Characteristic Option	Characteristic option to define the source specification in the compatibility rule.

Field	Description
	Select the characteristic options that are associated with the product, service, or resource specification.

5. Select **Submit**.

What to do next

.

Create and publish your product offerings to a catalog

Create and publish versioned product offerings to a product catalog so that you can define how you sell your products to your customers.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

A versioned product offering is the customer-facing entity of a product. It contains the product description, pricing, eligibility, and product options. A versioned product offering is always associated with a product specification. Only published product offerings can be added to customer contracts.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Offerings** > **Product Offerings**.
2. Select **New**.
3. On the form, fill in the fields.

   For information about the field descriptions, see the Product offerings form fields section in .
4. Select **Submit**.
5. In the Product Offerings list, select the versioned product offering that you created.
   The versioned product offerings record appears, with the Product Offering Characteristics and Product Visuals related lists.
6. Add additional characteristics to your versioned product offering, if required.
7. **Optional:** Add product visuals to your versioned product offering.

   a. In the Product Visuals related list, select **New**.

   b. Enter a name for the visual.

   c. To select an image file to upload, select **Click to add**.

   d. To set your image as the primary image for the product, select **Set Primary**

   Note: You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.
8. When you finish creating the product offering version, do one of the following actions.

Action	Description
Publish	Publish the draft product offering so that you can use it in a product catalog: ◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a product offering, you can't change or delete it, unless you create a version for it.
Update	Update the product offering with the new data that you added, but don't publish it for use in a product catalog.
Copy	Copy the data in this product offering so that you can create a product offering from it. For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Of fering v3, but with a separate version track. When you use the Copy function, it creates a base version product offering and sets the val ues in these fields: ◦ **Version**: 1 (base version) ◦ **Initial Version**: Premium SD-WAN Offering v3 ◦ **Previous Version**: blank

What to do next

Add versioned product offerings to your product catalog.

Create a product catalog

Create a product catalog to add your product offerings. As a provider, you can use the product catalog to define how you want to sell products to your customers.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

The product catalog that the product offering is associated with appears in the form of a category in the service catalog on the customer's self-service portal. It groups similar product offerings that are targeted for a market or customer segment. A product offering is set to a catalog item in this category.

Procedure

1. Navigate to **All** > **Product Catalog** > **Offerings** > **Product Offering Catalogs**.
2. Select **New**.
3. On the form, fill in the fields.

Product catalog form

Field	Description
Number	ID of the product catalog.
Name	Name of the product catalog.
Description	Description of the product catalog.

4. Select **Submit**.

Creating and publishing specification versions

As a product catalog manager, you can create and publish the specification versions that list the improved products and services that you can offer to your customers in a technical product catalog.

Your product catalogs define the products, services, and resources available to your customers so they can decide what to purchase from you. Your catalog items will continue to evolve over time to accommodate the changes that are related to how your items are sold, configured, and delivered to your customers. Typically, these changes are related to engineering improvements that make the products, services, and resources more marketable and appealing to your customers. The changes usually are to the fit, form and function, characteristics, and characteristic options, and specification relationships of your catalog items. For example, a home internet product may evolve over multiple revisions to support changes that are related to pricing and increased internet speeds.

By creating new specification and product offering versions for your products, you enable your agents to work with the latest versions of your product and service offerings when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating specification versions for use in product offerings

As a product catalog manager, you do the following actions when you create a version of a specification for use in a product offering:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes.
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. As a product catalog manager, you update the following information to reflect the engineering changes that were made to the associated specifications:

    - Characteristics
    - Characteristic options
    - Specification relationships
    - Decomposition rules
    - Quantity mappings
    - Attribute propagation rules

Note: To learn more, see Create and publish a specification version.

3. Create a product offering, and then publish it when you update your product catalog. To learn more, see Create and publish a product offering version.
4. Retire or archive old or unused specifications, and product offerings. To learn more, see Retiring or archiving versioned specifications and product offerings.

Updates and validations that are performed when you create and publish a specification version

When you create a version for a currently published specification, the system copies the following data into, or populates, the new specification record as follows:

1. Copies the following fields with these basic specification details:
   - **Category**
   - **Type**
   - **Start** and **End** date
   - **Description**
   - **External ID**
   - **Product code** and **Product line**
   - **Cost to Company**
   - **Composite**
   - **Installation Required**
   - **Location-specific**
2. Blanks out the **External Version** field.

   Note: The **External ID** and **External Version** fields don't appear on the specification forms by default but can be added by changing the form layouts.

3. Populates the following fields with the detailed information that you enter for the new specification version:
   - **Version**. The next incremental number appears.
   - **Display Name**. The display name is the system-assigned concatenation of the specification name and its current version number. You can overwrite this field.
   - **Initial Version**. The name of the base version of the specification appears but can't be changed.
   - **Previous Version**. The name of the specification is as it was in the previous version.
4. Copies the associated characteristic and characteristic options. To learn more, see Create the characteristics and characteristic options for your product offerings.
5. Copies the associated specification relationships, attribute mapping, decomposition rules, and quantity mappings when you use extension point scripts. When copied, the source specifications in the associated specification relationship and decomposition rule records are automatically updated to the current versions of the source specifications.

Note: To learn more about these rules, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.

6. Copies the associated quantity mappings and attribute propagation rules. The source specifications in the quantity mappings and attribute propagation rules are also updated to the current versions. To learn more about these rules, see .

When you publish the updated specification version, the ServiceNow AI Platform® performs validations on your edits. These validations ensure that all rules are valid with the characteristic and characteristic options that are available for the new specification version. An error might occur if you inadvertently remove or change the characteristics or characteristic options that are referenced by the other rules that are associated with the new specification version. If an error occurs, a message similar to this example appears.

Copied rules validation errors

You can publish a new specification version only after you resolve all errors. This table contains some possible validation errors that you may see and the actions you can take to resolve the issue.

Copied rules validation errors and resolution actions

Error	Resolution actions
Invalid specification version in the specification relationship.	Update the source specification version to the current version: 1. Select **Specification Characteristics**. 2. Update the **Source Specification** field in the Specification Relationships form.
Invalid specification versions in the decomposition rule.	Update the source specification version to the current version: 1. Select **Specification Relationships**. 2. Update the **Source Specification** field in the Specification Relationships form.
Invalid characteristic in the decomposition rule.	Update or remove the invalid characteristic in the Decomposition Rules form: 1. Select **Specification Characteristics**. 2. Update or remove any invalid characteristics.
Invalid characteristic options in the decomposition rule.	Update or remove the invalid characteristic options in the Decomposition Rules form: 1. Select **Specification Characteristics**. 2. Update or remove any invalid characteristic options.

Copied rules validation errors and resolution actions (continued)

Error	Resolution actions
Invalid characteristic options in the quantity rule.	Update or remove the invalid characteristic options in the Attribute Mappings form: 1. Select **Attribute Mappings**. 2. Update or remove any invalid characteristic options.
Invalid specification version in the attribute propagation rule.	Update the **Source Specification** field in the Attribute Propagation form to the current version.
Invalid characteristic in the attribute mapping rule.	Update or remove the invalid characteristics in the Attribute Mappings form: 1. Select **Attribute Mappings**. 2. Update or remove any invalid characteristics.

Create and publish a specification version

Create and publish a version of an existing specification in a Published state so that you can offer an improved version of it to your customers in your product catalog.

Before you begin

Before you can create a version of a specification, an initial base version of the specification must exist and already be published. The information that you supply for a new version is the same as what you entered for an initial base version, but with some important differences. To learn more, see .

Role required: sn_prd_pm.product-catalog_manager

About this task

You create versions of service and resource specifications in the same manner as you do a resource specification.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Specifications**.
2. In the Product Specifications list, select the product specification that you want to create a version for.
3. On the form, select **Create New Version** and then fill in the fields.
   The manner in which you create a version of a specification is similar to how you created its initial version, with the differences that are explained in the following table.

Product specification form

Field	Description
Name	Name of the new product specification. If the name of the item for the new version differs from the previous version, you can enter a new name.

Field	Description
Version	Version number that is assigned to a specification: ◦ When you create the initial version, 1 appears in this field, and can't be changed. ◦ When you create subsequent versions of the specification, the next incremental number appears in this field after you select **Create New Version**. For example, 4 appears in this field if 3 was the previous version number.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. ◦ When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. ◦ When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten.
Initial Version	Name of the base version of the specification that appears but can't be changed.
Previous Version	Name of the previous version of the specification. For example: ◦ When you create the initial version of the specification (for example, version 1), this field is empty. ◦ When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. ◦ When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

Note: For information about the remaining field descriptions, see Field descriptions for product catalog forms in Order Management for Telecommunications, Media, and Technology.

4. To reflect the engineering changes that were made to the physical product, update the specification relationships, decomposition rules, quantity mappings, and attribute propagation rules as follows:
   a. To update the characteristics and characteristic options that are associated with your specification, use the Specification Characteristics related list. To learn more, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.
   b. To update the specification relationships and accompanying decomposition rules, use the Specification Relationships related list. To learn more, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.
   c. To update attribute mappings, use the Attribute Mappings related list. To learn more, see .
   d. To create a product offering from the specification, navigate to the Product Offerings related
5. When you finish creating the specification version, do one of the following actions.

Action	Description
Publish	Publish the draft specification so that you can use it in a product catalog as follows: ○ When you publish it, its state changes from Draft to Published. ○ After you publish a specification, you can't change or delete it, unless you create a ver sion for it.
Update	Update the specification with the new data that you added, but do not publish it for use in a product catalog.
Copy	Copy the data in this specification so that you can create a specification from it. When you use the Copy function, it creates a base version specification, and sets the val ues in these fields: ○ **Version**: 1 (base version) ○ **Initial Version**: ○ **Previous Version**: blank

Note: To learn more about the validations that are performed when you publish a new specification version, and how to resolve any reported errors, see the section about validations in Create and publish a specification version.

Related topics

Create and publish product specifications

Create and publish service specifications

Creating and publishing product offering versions

As a product catalog manager, you can create and publish the product offering versions that list the improved products and services that you can offer to your customers in a product catalog.

Overview of product offering versions

You create product offering versions for an existing product that you're improving. You typically create versions of product offerings by combining new versions of product, service, and resource specifications. Proper versioning enables your customer service agents to know what the latest versions of your product and service offerings are when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating versions of product offerings

When you create a version of a product offering, do the following actions:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes. To reflect the engineering changes that were made to the physical product, edit the following data that is associated with the product offering version:
   - Characteristics
   - Characteristic options
   - Product specifications
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. To learn more, see .
3. Create the product offering, and then publish it when you update your product catalog.
4. Retire or archive old or unused specifications, and product offerings. To learn more, see Retiring or archiving versioned specifications and product offerings.

Updates and validations that are performed when you create and publish a product offering version

When you create a version for a currently published product offering, the ServiceNow AI Platform® copies the following data into, or populates, the new product offering record with the following data:

1. Copies the following fields with these basic product offering details:
   - **Product Specification**
   - **Contract Term**
   - **Monthly Recurring Charges**
   - **Non Recurring Charges**
   - **Description**
   - **Offering Catalog**
   - **Distribution Channel**
   - **Start** and **End** date
   - **Product code** and **Product line**
   - **Cost to Company**
   - **Composite**, **Installation Required**, and **Location-specific** indicators
2. Populates the following fields with the detailed information that you enter for the new product offering version:

- **Version**. The next incremental number appears.
- **Display Name**. The display name is the system-assigned concatenation of the product offering name and its current version number. You can overwrite this field.
- **Initial Version**. The name of the base version of the product offering appears but can't be changed.
- **Previous Version**: The name of the product offering is as it was in the previous version.

When you publish the updated product version, additional validations are performed on your edits. To learn more, see the Updating and validating copied rules for a new specification version section in Create and publish a specification version.

Create and publish a product offering version

Create and publish a version of an existing product offering in a Published state so that you can offer an improved version of it in your product catalog.

Before you begin

Before you can create a version of a product offering, an initial base version of the product offering must exist and already be published. The type of information that you supply for a new version is the same as what you entered for an initial base version, but with certain differences. To learn more, see Create and publish your product offerings to a catalog.

Role required: sn_prd_pm.product-catalog_manager

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Offering**.
2. In the Product Offerings list, select the product offering that you want to create a version for.
3. On the form, select **Create New Version**, and then fill in the fields.
   The manner in which you create a version of a product offering is similar to how you created its initial version with the following exceptions.

   Note: For information about the remaining field descriptions, see

4. To reflect the engineering changes that were made to the physical product, update the product offering version:
   a. To update the characteristics that are associated with your product offering, use the Product Offering Characteristics related list.
   b. To update the product visuals for your versioned product offering, use the Product Visuals related lists.
   c. **Note:** To learn more, see .
5. When you finish creating the product offering version, do one of the following actions.

Action	Description
Publish	Publish the draft product offering so that you can use it in a product catalog:

Action	Description
	◦ When you publish it, its state changes from Draft to Published. ◦ After you publish a product offering, you can't change or delete it, unless you create a version for it.
Update	Update the product offering with the new data that you added, but don't publish it for use in a product catalog.
Copy	Copy the data in this product offering so that you can create a product offering from it. For example, you can use the Copy function if you want to create a base version product offering that is similar to Premium SD-WAN Offering v3, but with a separate version track. When you use the Copy function, it creates a base version product offering and sets the values in these fields: ◦ **Version**: 1 (base version) ◦ **Initial Version**: Premium SD-WAN Offering v3 ◦ **Previous Version**: blank

Retiring or archiving versioned specifications and product offerings

As a product catalog manager, you can move a published specification or a product offering to a Retired or Archived state when they are no longer in use or are being sold. When you retire a specification version, you can't use it in a product offering or create specification versions.

Retire or archive a specification version

Move a published specification version to a Retired or Archived state when the version is no longer in use or being sold to your customers. When you retire a specification version, you can't use it in a product offering or create a specification version.

Before you begin

Role required: admin

About this task

You can maintain only one active version of the specification. When you retire or archive a specification version, you can't do the following actions:

- Update the specification version.
- Use it to create other catalog entities or rules such as product offerings, specification relationships, attribute mappings, or decomposition rules.

You retire or archive service and resource specification versions in the same manner.

Note: To archive a specification version, you must first retire it.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Specifications** > **Product Specifications**.
3. Select a record you want to modify.
4. Navigate to the **Versions (n)** tab to view the previous versions that are related to this specification.
   Here, n represents the number of base and previous versions for this specification. For detailed information about the field descriptions, see .
5. Retire or archive one or more specification versions.

   a. To retire a previous specification version, select the checkbox next to the Number column, and then select **Retire**.
      Validations ensure that the specification version is not being used in other active specifications or product offerings. If it's being used in a published specification or product offering, the following message appears:

      ```
      Selected specification(s) will be changed from
       Published to Retired state. This could affect published
       specifications/product offerings.Are you sure you want to
       archive the selected specification(s).
      ```

      To retire this specification, select **Retire**.

   b. To archive a previous specification version, select the checkbox next to the Number column, and then select **Archive**.

   When you retire a specification, its state changes to Retired. After you retire a specification, you can't make any changes to it, use it in a product offering, or create specification versions for it.

Retire or archive a product offering version

Move a published product offering version to a Retired or Archived state when it is no longer in use or being sold to your customers. When you retire a product offering version, you can't use it in a product catalog.

Before you begin

Role required: admin

About this task

You can maintain only one active version of the product offering. After a product offering is retired or archived, you can't do the following actions:

- Update the product offering version.
- Use it in a product catalog.

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Offerings** > **Product Offerings**.
   A list of product offering records is displayed.
3. Select a record you want to modify.

4. To view the previous versions that are related to this product offering, select **More** > **Versions (n)**, where n represents the number of base and previous product offering versions.

   For detailed information about the field descriptions .

5. From the Versions (n) tab, you can select one or more product offering versions to retire or archive.
   - To retire a previous product offering version, select the check box next to the Number column, and then select **Retire**.
   - To archive a previous product offering version, select the check box next to the Number column, and then select **Archive**.

Create and publish a template

Create and publish a template so that you can define the 5G network services for your organization.

Before you begin

Role required:

- sn_prd_pm.product_catalog_admin
- sn_prd_pm.product_catalog_manager (Read-only access)

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Templates** > **All**.
3. Select **New**.
4. On the form, fill in the fields.

Template form

Fields	Descriptions
Number	System-generated number of the template.
Name	Name of the template.
Description	Description of the template.
State	State of the template. **Draft** The template is created, but not yet published in the catalog to be used in the product or service specifications. **Published** The template is published in the catalog and in use in the product or service specifications. **Retired** The template is retired and you can't make any changes to the retired template.

Fields	Descriptions
	Archived The template is archived. You can archive only a retired template.

5. Select **Save**.
6. Navigate to the **Template Characteristics** tab, select **New**, and fill in the fields on the form.

Template Characteristics form

Fields	Descriptions
Number	Number of the automatically filled-in template.
Characteristic	Characteristic of the network service that you're defining.
Template	Template name that is automatically selected.
Mandatory	Mandatory characteristics that are confirmed by the system when this option is selected.

7. Select **Save**.
8. Select the **Template Characteristic Options** tab, select **New**, and fill in the fields on the form.

Template Characteristic Options form

Fields	Descriptions
Number	Number of the automatically filled-in template characteristic.
Template characteristic	Template characteristic that you have defined.
Characteristic option	List of the characteristic options defined in the Template Characteristic table.

9. Publish, save, or copy the draft template.

Action	Description
Publish	Publish the draft template so that you can use it in a service specification.

Action	Description
	Note: A dialog box appears with the following message: Changes to templates are not allowed once published. Are you sure you want to publish? Do one of the following actions: ◦ To skip publishing this template, se lect **Cancel**. ◦ To publish this template, select **OK**. When you publish it, its state changes from Draft to Published.
Save	Update the template with the new data that you added.
Copy	Copy the data in this template so that you can create a template from it.

What to do next

Create and publish the service specifications and associate them with the templates. For more information, see Create and publish service specifications.

Retire or archive a template

Move a published slice template to a Retired or Archived state when the template is no longer in use. When you retire a template, you can't use it in a service specification.

Before you begin

Role required: sn_prd_pm.product_catalog_admin

About this task

After you retire or archive a template, you can't do the following actions:

- Update the template
- Use it to create other template entities such as template characteristics and template characteristics options

Procedure

1. Open CSM Configurable Workspace.
2. Navigate to **List** > **Templates** > **All**.
   A list of templates is displayed.
3. Open the template that you want to retire and select **Retire**.
4. Open the template and select **Retire**.
   A dialog box appears with the following message: `Are you sure you want to retire this template? Once you retire it, you can't make changes to it.`

   If the template is being used in a published specification, the following message appears: `Are you sure you want to retire this template? It's used in one or more published specification.`

Do one of the following actions:

- To skip the retirement of this template, select **Cancel**.
- To retire this template, select **Retire**.

5. Archive this template by selecting **Archive**.
A dialog box appears with the following message: `Are you sure you want to archive this template?`

Do one of the following actions:

- To skip archiving this template, select **No**.
- To archive this template, select **Yes**.

Note: You can only archive a retired template.

Configuring Order Management for Service Exchange Consumers

As a customer, you must complete some configuration tasks so that you can set up the Order Management application.

Order Management configuration tasks

Task	Description
Install and set up Service Bridge customers	Install and set up the application so that you can integrate your instance with the instance of your provider. This integration enables synchronous publishing of product and service catalogs so that your employees can submit product or service requests. **Note:** For more information, see Configure Service Exchange for Consumers.
Assign catalog_admin role	Assign the catalog_admin role to the users who manage the service catalogs. Users with this role can publish product offerings from providers to their service catalog.
Review and publish product offering catalogs	Review and publish product offering catalogs that you received from your service providers.
Configure specification version updates so that product specification versions can be updated to reflect changes and updates.	To configure update specification versions, see Configure update specification versions.

Configuring order priority and routing

As a provider, you can configure various parameters to prioritize and route orders to ensure that they are fulfilled on time.

Use order prioritization to:

- Define prioritization rules using various customer, products, service, and order attributes.
- Assign order priority while creating orders based on the pre-defined rules.

- Identify urgent orders that need to be fulfilled immediately.
- Automatically route high priority orders to a specific fulfiller group.
- Ensure that orders are fulfilled in a committed date.
- Recalculate order priority when any changes occur.

In Order Management, the order priority is calculated using pre-defined rules based on the following categories of data.

Category	Input
Customer	Customer account
Specification	• Product specification • Service specification • Product offering
Order type	Order line item
Urgency	Order line item

Note: The inputs used in these decision tables and the rank can be modified according to your business requirements.

These rules are defined in the following decision tables:

- Order Priority Policy by Customer Attributes
- Order Priority Policy by Order Type
- Order Priority Policy by Specification Attributes
- Order Priority Policy by Urgency

Each parameter defined in the decision table has a rank value assigned to it. When an order is created, the decision tables are evaluated and a weightage is assigned to each table to calculate the order priority. See Calculating the order priority on how the priority is calculated.

Note: You can add new inputs, conditions, or modify the existing conditions in the decision tables. For more details on updating decision tables, see Using decision tables.

Calculating the order priority

Order priority is calculated based on the rank defined in the decision table and the weightage assigned to each table.

The rank and weightage can be a number between 0 to 100 and priority levels are defined as follows:

- Critical: 80 - 100
- High: 60 - 80
- Medium: 40 - 60
- Low: <40

Note: Depending on your business requirements, you can modify the order priority by editing the rank and weightage in the *sn_ind_tmt_orm.PriorityManagement* extension script. This extension point script is used to manage priority ranks from decision tables for order line items. Any changes made in the script will override the rank and rank and weightage defined in the decision tables.

Priority is calculated as follows:

*sum of (rank * weight)/sum of weight*

For example, if the rank and weight for each decision table is defined as follows:

Decision table	Rank	Weight
Customer	100	10
Specification	80	25
Order type	80	35
Urgency	60	30

In this example, priority is calculated as:

*Priority = (100 * 10 + 80 * 25 + 80 * 35 + 60 * 30) / (10 + 25 + 35 + 30) = (7600)/100 = 76*

The order priority is set to **high** in the customer order and in the order line items.

Note: The highest priority specified for the order line items is used to set the priority for the customer order. The order line item priority is then propagated to the corresponding domain orders and order tasks.

Adding a priority rule

Apart from the rules defined in the decision tables provided with the base system (see Configuring order priority and routing), you can create additional decision tables and a new extension point implementation to add new priority rules. To create a new priority rule, follow these steps:

1. Navigate to**All** > **Decision tables**.
2. Click **New** and select **Decision table**.
3. Enter a name for the decision table, select the application and application scope for the decision table and click **Build decision table**.
4. Define the inputs and conditions for the decision table.
5. Add the Rank in the Result column and click **Save**.
6. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
7. Click the *sn_ind_tmt_orm.PriorityManagement* script.
8. Click **Create implementation** in the Related Links section.
9. Enter a name for the new script (implementation) and edit the getRank() and getWeightage() methods in the script to return the rank and weightage values and click **Update**. A sample implementation script is shown below:

```
var PriorityManagement = Class.create();
PriorityManagement.prototype = {
```

```
    initialize: function() {},
    getRank: function(customerOrderItemGr) {
        /*
            get rank from decision policy or scripting
            return rank;
        */
        return getRankFromNewDecisionTable(customerOrderItemGr);
    },
    getWeightage: function(){
        /*
            get weightage to calculate priority
            weight should be an integer value, and range is from
 0 to 100.
            return weight;
        */
        return weight_value_for_this_decision_policy;
    },
    type: 'PriorityManagement'
};
```

Calculating the priority for external orders

Orders created by external order capture systems can also be processed by Order Management for Telecommunications. In this case, for

- Order line items:
  - If a valid priority value has been defined for the external order, this value is used to calculate the priority.
  - If a priority value has not been defined or is invalid, the order priority is calculated by the Order Management for Telecommunications system.
- Customer orders: The priority value is calculated based on the categories defined in the decision tables and this value overrides the value specified in the external order.

Recalculating the order priority

Manually update the priority field on customer order, order line items, domain orders, and order task forms.

Before you begin

Role required: admin

About this task

When a customer order is updated, all child order line items will be recalculated. If you modify the priority of one or more child order line items, the highest priority level is used to recalculate the customer order priority. You can manually modify the priority value for orders, order line items, domain orders, or order tasks and recalculate the order priority. This option recalculates the priority of the order and order line item by re-evaluating the decision tables and extension point script.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Customer Orders**.
2. Select the order that you want to recalculate.

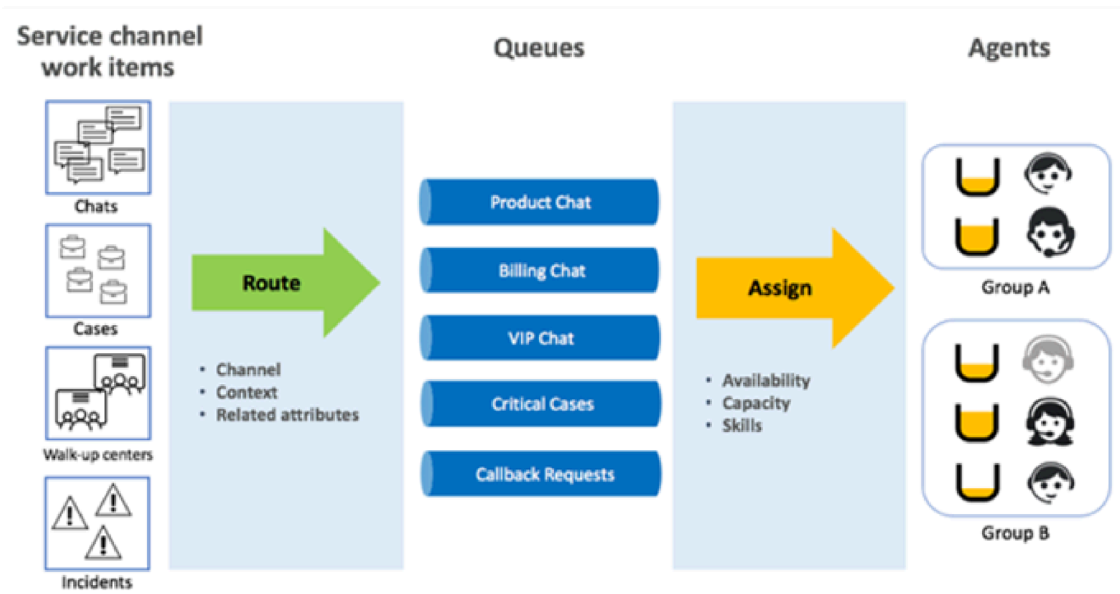
3. Update the Priority field in the Customer Order form or for the order line items and select **Re-calculate**.
   The decision tables are re-evaluated with the latest order, customer, and urgency data to recalculate the order priority.

Order routing based on priority using Advanced Work Assignment

AWA can be used to automatically route customer orders based on priority to specific agent categories.

Use AWA to automatically assign work items (order tasks) to your agents based on their availability, capacity, and skills. AWA pushes work to qualified agents using work item queues, routing conditions, and assignment criteria. Agents can view their assignments in their Agent Workspace inbox. The following diagram shows how AWA routes different types of orders to different fulfillment agents.

Note: All fulfillment agents must have the AWA agent (awa_agent) role.



The following configurations are required for AWA:

- Service channel: It is a means of assigning a specific type and scope of work to agents. The Order Service Channel is available with the base system for order tasks. The Order Service Channel is in a disabled state by default and must be manually activated.
- Agent presence state: Availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. The default presence states are Available, Away, and Offline. After the Order Service Channel is enabled, the Available presence state value shows the Order Service channel the customer has to move the order service channel to the selected list to receive the work.
- Queue: A queue stores a specific type of work item for a service channel. AWA admins can create queues that focus on certain types of support in the channel, such as VIP customers or critical cases. AWA routes work items to queues based on specific conditions or requirements that you define, such as customer status, or region. Groups assigned to each queue handle the incoming work items. Once work items are placed in a queue, AWA can then assign items to

available agents based on assignment rules and agent availability and capacity. Demo queues that can be used as a reference are available with the base system.

- Assignment rule: Criteria that determines how work items are pushed to the appropriate agent in a qualified assignment group. A demo assignment rule that can be used as a reference is available with the base system.
- Agent capacity: The maximum number of work items on a particular service channel that an agent may actively work on at one time.
- Agent availability: States that indicate agent presence and whether the agent is available for work or is busy or offline. AWA uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in Agent Workspace. The Default Order Layout is available with the base system and can be used as a reference to create a new layout.

For more details, see Advanced Work Assignment

Integrating Order Management with southbound external systems

If you have a Telecommunications Service Management subscription, you can submit outbound service order requests to various external systems by integrating the Order Management application with the external southbound systems.

After the decomposition of an order, the Order Management application requires the support from external network activation, network configuration, and resource management systems to manage the fulfillment life cycle of the order.

Using this integration, a Communications Service Provider (CSP) can do the following tasks:

- Trigger outbound requests for one or more domain service orders by using the TeleManagement Forum (TMF) 641 Open POST order API.
- Share updates with the external systems about the inflight changes to the existing domain service orders that have outbound requests.
- Manage the inbound response of the outbound requests for the domain service orders.
- Manage the errors and exceptions for the outbound requests and inbound responses.

How the integration works

The integration process for Order Management with the external technical order management systems is as follows:

1. As the administrator, you activate the Service Order Open API to capture the service order from the customer orders. To learn more, see TMF641 Service Order Open API- POST .
2. The integration now begins:
    a. The order fulfillment manager selects the Create fulfillment request UI action in the domain order table.
    b. The Service Order Outbound Policy decision table checks the domain order attributes, and the order management system generates the payload for the domain service order.
    c. The generated payload is sent to the endpoint of the external fulfillment system. For more information on configuring external system endpoints by creating an integration request, see Workflow Studio flow integrations .

Note:

- If the domain order is configured as hierarchical in the decision table, the system sends all the child service domain orders in the hierarchy to the external system that is configured in the application spoke selector.
- If the domain order is configured as non-hierarchical in the decision table, the systems send only the individual domain order to the external system that is configured in the application spoke selector.

To learn more about spokes, see Building spokes using Spoke Generator.

3. The service order manager selects the Create Outbound Fulfillment Request UI action on the service order form and the system shares the service order details with the external systems.

   Note: The UI action appears if any of the following conditions is met by the system:

   - No successful outbound request exists for the service domain order yet.
   - An outbound request exists but the current external fulfillment state of the service domain order is an error.

4. If the fulfillment request is successful, a response is received from the external system and is captured in the Outbound Request table (sn_tmt_core_outbound_request). To learn more, see Create outbound requests for service orders.

Task plan templates driven order fulfillment

Use the task plan template to define tasks and their dependencies that are needed to orchestrate the fulfillment journey for a product to standardize fulfillment processes across products.

A no-code approach in ServiceNow® that allows you to create task orchestration workflows using task plan templates. It as an alternative to flow designer, giving more options for implementing product configurations.

For more information about Flow actions for fulfillment subflow definition, see Flow actions for fulfillment subflow definition.

When the template is configured for a specification, the out of box logic, on domain order creation automatically searches for a matching template, based on the task's specification and action of domain order. When a template match is found, the template is applied to generate the order tasks under the domain order. To learn more about task plan template, see Task plan templates.

Benefits of task plan template

It enables non-technical users to do the following:

- Define fulfillment journeys.
- Manage task dependencies for simple task creation without developer involvement.
- Reduce IT dependency.
- Accelerate deployment of new offerings.

Create a task plan template

You can create a task plan template by following these steps.

Step	Explanation
Create a task plan template.	Create the template and set the conditions as to when the template applies. • The template functions as a container or group of template items. • The template identifies a plan to apply the associated template items.
Configure task plan template	To add conditions to a template item that determines when a template item is applicable.
Create one or more template items.	Create the template items to include in the task plan template. These items can be tasks, child cases, or child case tasks. • Template items are the tasks or records that are to be created when the template is applied. • Template items can be used to define a hierarchy of parent and child entities of any task type.
Create conditions for template items.	Set conditions as needed for each of the template items that identifies when a template item should be created.
Task dependencies for task plan templates	It provides controlled sequencing within the generated records from the template items in the Task Plan Template Dependency table. By defining predecessor and successor relationships, the tasks can start at correct time reducing ambiguity for agents.
Publish the task plan template.	While in the Draft state, you can make changes to the template, template items, and template item conditions. It allows to publish if the same condition template is not available. Publish the task plan template to apply it to cases and case types. To publish a task plan template, select **Publish** on the Task Plan Template form.

Configure the task plan template

Configure the task plan template to add conditions to a template item that determines when a template item is applicable for domain orders.

Before you begin

Before you add filter condition, make sure that the task template target record is domain order.

Role required: admin

Procedure

1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Open the record.

   Use this field to add the conditions for the template item. Each condition contains a field, operator, and value(s).
3. Select **Add Filter Condition**.
   - Add these conditions:

Fields	Conditions
Choose Field	Select **Specification**.
oper	is
Value	Select the specification from the list of records for domain order.

   - Select **+New condition set** to add a new condition.

     Add these conditions:

Fields	Conditons
Choose Field	Select **Action** from the list.
oper	is
Value	Select one of these values from the drop-down list: ▪ Add ▪ Change ▪ Disconnect ▪ Cancel ▪ Suspend ▪ Resume

- Select **x** to remove a condition.
- Select **Set** to save the conditions and close the pop-up window.

4. Select **Update**.

Using Sales CRM for Telecommunications applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales CRM for Telecommunications applications.

From the workspace you can access product catalogs to see the product offerings available in your organization and select them for Sales CRM for Telecommunications transactions.

To learn about how to use Sales CRM for Telecommunications applications, see the following:

Applications	Description
Methods of creating orders in Sales Customer Relationship Management	Orders can be created by agents, customers, or using APIs in ServiceNow Order Management. Irrespective of where or how you create orders, all orders can be managed, tracked, and fulfilled using Order Management.
Approving and fulfilling customer (product) orders	Learn how your organization can use the Order Management application to fulfill customer orders.
Create outbound requests for service orders	As a provider, create an outbound request for the service orders. You can interact with the external Service Order Management (SOM) or Technical Order Management (TOM) systems to manage the end-to-end order fulfillment process.
Service qualification requests	Use the Technical Service Qualification API to evaluate a service request for feasibility and availability before you submit an order for fulfillment in the Order Management application.
Creating, reviewing, approving, and fulfilling service orders	Service Order Management (SOM) is a domain of order management that is responsible for the end-to-end life cycle of service requests. Learn how service orders are captured Order Management, and how your fulfillment managers and agents review, orchestrate, and fulfill them.
Creating orders for services, service changes, or disconnects	With Order Capture, your service agents can directly enter multi-site service orders with one or more services on behalf of your customers. They can also manually create service change requests and disconnect orders in the ServiceNow AI Platform. Order Capture is supported in the San Diego release and later releases.

Applications	Description
Reviewing service orders for fulfillment	Learn how your order fulfillment manager can review service orders for fulfillment by using the Order Management application. With this application, you can make sure that your service orders are fulfilled correctly.
Approving and fulfilling service orders	Learn how your organization can perform post-approval service order fulfillment. By using this application, you can confirm that your service orders are fulfilled correctly.

Approving and fulfilling customer (product) orders

Learn how your organization can use the Order Management application to fulfill customer orders.

Your order fulfillment manager and order fulfillment agent must do the approval and fulfillment tasks that are described in the following table.

Customer order processing tasks

Task	Description
Review a customer order and approve or reject it for fulfillment.	An order fulfillment manager approves or rejects a customer order for fulfillment. If it's approved, the sold product and order decomposition processing can take place. If it's rejected, more investigation is needed. To learn more, see: • Approve or reject a customer order for fulfillment • Creation of sold product and product inventory records • Order decomposition
Review the product orders that are associated with the approved customer order.	An order fulfillment manager reviews the product orders that were generated for the customer order line item. To learn more, see View domain orders.
Use the Orchestration Plan UI to review the domain orders and order tasks that are associated with the approved customer order.	An order fulfillment manager reviews the orchestration state and hierarchical structure for a selected customer or service order, its associated order line items, domain orders, and order tasks. It indicates how much progress has occurred in the fulfillment process. To learn more, see Order fulfillment.
Review and update the fulfillment tasks that are associated with a customer order.	An order fulfillment agent performs the tasks that are required for post-approval customer order fulfillment, including marking the order

Customer order processing tasks (continued)

Task	Description
	tasks as complete. The order fulfillment manager creates the order fallout records for the order tasks that can't be completed. To learn more, see: • Review and close fulfillment tasks • Managing order fallout
Follow up on the tasks that couldn't be completed by examining the order fallout records and reassign them for more investigation.	An order fulfillment manager reviews the tasks that couldn't be completed in the order fallout records and reassigns the order tasks to fulfillment agents for investigation and resolution. To learn more, see, Review a fallout record

Approve or reject a customer order for fulfillment

Select a customer order, and review the account, contact, pricing, and date details to make sure that the order is correct and complete. If you're an order fulfillment manager, can approve or reject a customer order with a New state for fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

Note: If the following error message appears in the San Diego release or above after approving an order, it indicates that a required upgrade script was not run.

```
Some of the OMT tables need reparenting. Please contact
 administrator to execute the reparenting script.
```

The Post Upgrade Script performs required order management table reparenting and column promotion. If the script hasn't been run, the order decomposition and order fulfillment functions won't function as designed until your system administrator runs it. To learn more, see Restructured Order Management tables.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.

   Note: If you aren't currently using configurable workspaces, navigate by using the following path:

   Workspace Experience > **Workspaces** > **Agent Workspace Home**.

   To learn more about migrating to configurable workspaces, see Migrate to Configurable Workspace.

   If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

a. From the Configurable Workspace Lists icon, click **Customer Orders**.

b. Do one of the following actions:

- To view all customer orders, click **All**.
- To view only open, unfulfilled customer orders, click **Open**.

c. Select the customer order that you want to review, verify, approve, or fulfill:

- To refresh the form, click the refresh icon.
- To filter existing customer orders, click the filter icon.

2. To select the customer order that you want to review, click the appropriate tile in the Customer Order Management workspace.
3. On the Customer Order form, review the order number, account, and contact information for the selected customer order.

   For information about the field descriptions, see the Customer Orders form fields section in Customer and Service order details forms.
4. To approve or reject fulfillment of a customer order in a New state, perform one of the following actions.

Action	Description
Approve a customer or service order for ful fillment	In the Customer Order form, do the following actions: a. Click **Approve**. b. Click **Save**. When you approve an order for fulfillment, the following actions take place: ◦ The **State** field changes to In Progress. ◦ The **Revision Operation** field is set to None. **Note:** You must have an sn_ind_tmt_or m.order_fulfillment_manager role.
Reject a customer or service order for fulfill ment	In the Customer Order form, do the following actions: a. Click **Reject**. b. Click **Save**. When you reject an order for fulfillment, the following actions take place:

Action	Description
	◦ The **State** field changes to In Rejected. ◦ The **Revision Operation** field is set to None. **Note:** You must have an sn_ind_tmt_orm.order_fulfillment_manager role. You can approve an order that you previously rejected.

Restructured Order Management tables

The table architecture that supports the Order Management for Telecommunications, Media, and Technology application has been restructured. Existing customers who upgraded from earlier releases to the San Diego release must first run a Post upgrade Script to reparent the order tables and then perform column promotions.

Before you use Order Management for Telecommunications, Media, and Technology (2.0.0), you must run the Post Upgrade Script after your upgrade to San Diego. For detailed information about this script, see the Order Management for Telecommunications, Media, and Technology (2.0.0) version: Post upgrade reparenting script for the San Diego release [KB1000941] article in the Now Support Knowledge Base.

Note: If you don't run this script to perform table reparenting and column promotion, the order decomposition and order fulfillment functions don't work as designed. In these cases, the following error message appears after the approval of an order:

```
Some of the OMT tables need reparenting. Please contact
 system administrator to execute the reparenting script.
```

By using the Now Support Portal, raise a new Case with the Technical Support team to assist you in applying these changes.

Creation of sold product and product inventory records

Learn how the Order Management application creates and maintains the customer product and service inventory. By using this application, you can maintain an accurate inventory of your customer products and services.

Customer product data record creation

Sold product records are created and added to the Sold Product [sn_install_base_sold_product] table after an order line is marked as closed complete. Product inventory records are created and added to the Product Inventory [sn_prd_invt_product_inventory] table after an order is decomposed, completed, and fulfilled. Product inventory records are created for products with specifications. Depending on how your admin has configured the sn_ind_tmt_orm.enable_prod_invt_for_order_management system property, either sold products or product inventory records are created. For more information, see Configure customer product data management.

The Product Inventory table extends the Sold Product table. Only the items from the product inventory are available for change, disconnect, suspend, or resume type orders.

Order workflow

The new order workflow is as follows:

1. After the fulfillment or service order manager approves the order, the product inventory record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active in the product inventory record.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.

Change order workflow

The change order workflow is as follows:

1. After the fulfillment manager or service order approves the order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.
4. If the change order included a request to disconnect a product or service, the associated product inventory record moves to an Inactive state after the order is complete.

   You can create orders with action type as disconnect for product inventory records that are in Active or Suspended states.

   For suspend type orders, the end state is Suspended after the suspend workflow is completed. Product inventory state changes from Active to Suspended after all tasks and jobs have finished.

   For resume type orders, the end state is Active after the resume workflow is completed. Product inventory state changes from Suspended back to Active after all tasks and jobs have finished.

Related topics

Customer Life Cycle Management Workflows

Managing post-fulfillment order changes

Request post-sale change orders

Order decomposition

Order decomposition is the process of breaking down an approved customer or service order into a set of smaller, manageable domain orders for fulfillment. This process is driven by definitions in the product catalog to ensure that all necessary components are provisioned correctly. Learn about the decomposition process for customer and service order and their differences.

Order decomposition

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Overview of order decomposition

When an order is approved, the system breaks down the commercial elements of an approved order into its smaller, actionable technical components called domain orders (product, service, and resource orders) for fulfillment. Decomposition defines the Bill of Material for an ordered component. The decomposition is guided by specifications, specification relationships, and decomposition rules defined in the product catalog. Decomposition rules (often exclusion rules) determine when domain orders should or should not be created, based on characteristics or options present in the order line item. Decomposition establishes hierarchical relationships between source and target specifications, generating the necessary product, service, and resource orders.

For example, consider the SD-WAN Service Package from the demo data. For this product, specification relationships and decomposition rules determine which product, service, and resource orders are generated based on the order's characteristics.

During order decomposition, work orders are created for product or service orders that need further action. For example, installation of a device at the customer site. You must close the order tasks and work order tasks associated with the domain orders to proceed with order fulfillment. Fallout records are created if you manually close the domain orders.

Hierarchy of domain orders

The domain order hierarchy is structured as follows:

Product order (Parent)

Defines the commercial intent of what is being sold. It is based on a product specification that includes brand, pricing, terms, and other product-related materials. The product order initiates the fulfillment process by triggering associated service and resource orders.

Service order (Child of product order)

Manages the fulfillment of a specific service specification. It outlines the technical realization and delivery of the service, often involving multiple service and resource orders.

Resource order (Child of service order)

Handles the provisioning of physical or logical resources required to deliver the service. It is based on a resource specification and may include multiple resource orders depending on the complexity of the service.

Each product order can have multiple service orders, and each service order can have multiple resource orders, depending on the relationships defined in the product specification.

The role of specification relationships and decomposition rules

The following core components drive the decomposition process:

- Specifications: Define the attributes of products, services, and resources.
- Specification relationships: Define how different specifications are related to each other.
- Decomposition rules: Provide conditional logic for the decomposition process.

Decomposition runs on the specification associated with the order line item and its hierarchy. The type of relationship between specifications determines the outcome.

- If the relationship is of type Bundles, Realized as, or Requires, decomposition process creates the following types of orders for the target specification:
  - A corresponding customer-facing service order (CFS), which is a service order that is generated for performance of customer-faced services.
  - A resource-facing service order (RFS), which is a service order that is generated for internal use of resources required to perform the actual services for the customer.
  - Resource order.
- If the relationship is of type Composed of, decomposition does not occur for that relationship.

Decomposition rules function as exclusion rules. They are used to prevent the creation of certain domain orders if the incoming order does not contain a specific characteristic or characteristic option. This allows for optional components within a product or service offering. For example, a rule can be set to only generate a service order for a specific feature if the customer explicitly selected that feature during the ordering process.

Specification relationships and decomposition rules can be defined to exclude domain orders when certain characteristics are not present. For example, if a customer or service order does not include a required characteristic such as Tenancy or WAN Optimization, the related domain order is not generated.

The decomposition process uses the source specification (defining the relationship) and the target specification (being defined to), with rules mapped to specific characteristics and values.

When the attribute value is increased, more number of CFS/RFS is created.

When the attribute value is decreased, it decreases the number of CFS/RFS.

Customer order vs. Service order decomposition

While the fundamental principles of decomposition remain the same, there are key differences when decomposing a service order compared to a customer order. The most significant difference is that service order decomposition does not generate product orders. The process is focused exclusively on the fulfillment of services and their underlying resources. The decomposition of a service order generates a specific set of service and resource orders:

- Customer-Facing Service (CFS) Order: A service order for the performance of a customer-facing service.
- Resource-Facing Service (RFS) Order: A service order for the internal use of resources required to perform the actual service for the customer.

The scope of service order decomposition is focused on the logical breakdown of services. It does not typically involve concepts like staggered or quantity-based decomposition, which are more common in customer orders that may include physical products with variable quantities and complex, multi-stage fulfillment cycles. The key differences are listed in the following table.

Comparing decomposition of customer and service orders

Aspect	Description	Customer order	Service order
Trigger	Action that triggers order decomposition	Approval of a customer order by fulfillment manager	Approval of a service order by service order manager
Basis for decomposition	Basis on which the domain orders are generated	Based on specifications, specification relationships, and the	Based on specifications, specification relationships, and the

Comparing decomposition of customer and service orders (continued)

Aspect	Description	Customer order	Service order
		decomposition rules that are defined in the product catalog between the product, service, and resource specifications.	decomposition rules that are defined in the product catalog between the service, and resource specifications.
Domain order generated	Type of domain orders	Product, service, resource orders	Service and resource orders only
Staggered decomposition	The process that allows domain orders to be created at a later stage, based on updated information such as customer needs, service availability	Yes	No
Quantity-based decomposition	The process that supports splitting orders based on quantity, handling changes in order quantity, and managing inventory updates or cancellations for in-flight orders	Yes	No
Example	-	SD-WAN Service Package • Bundles multiple product specifications. • Decomposition creates a parent product order and multiple child product and service orders, with rules to include or exclude based on characteristics like Tenancy or WAN Optimization.	Managed firewall service Decomposition creates a customer-facing service order (CFS), multiple resource-facing service orders (RFS), and resource orders, based on relationships and characteristics present in the order.

Additional features in customer order decomposition

Customer order decomposition supports the following additional features:

- Staggered decomposition: Customer orders may use staggered decomposition, creating domain orders at later stages based on updated information such as service availability or customer needs.
- Quantity-based decomposition: Customer orders can be decomposed into multiple domain orders based on order quantity, supporting revisions, and fulfillment of multiple instances.
- Support for change orders: Customer order decomposition supports updates to quantity characteristics, enabling upgrades, downgrades, and inventory management during fulfillment.

Fore more information, see Customer order decomposition.

Related topics

Configuring Order Management

Order management

Revise an outbound request for the service order

As a provider, revise the outbound request that was previously created for a service order by using the Order Management for Telecommunications, Media, and Technology application. This way, you can share any inflight order changes with the external systems during the order fulfillment process.

Before you begin

Ensure that you have first created an outbound request for a service order.

Role required: sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

If you make any changes in the order properties, such as updating the domain order characteristics through the user updates or inflight changes while the order fulfillment is in progress, you might need to share the updated order details with the external systems. To learn more about managing the inflight order changes, see Managing inflight order changes and cancellation requests and Cancel orders.

A new Updates available order attribute tracks for any updates in the service order. If you update an order characteristic or revise the domain order (Updated or Canceled) as a part of the inflight revision, the value of the Updates available field is set to true. Also, the Revise Outbound Request UI action appears on the domain order form to trigger the revision of the outbound request.

Procedure

1. Select a service order and open it.
2. Select the **Revise Outbound Request** UI action.
   A dialog box appears with the following message: Want to revise outbound fulfillment request for the service order?

   Do one of the following actions:

- Don't trigger this action by selecting **Cancel**.
- Initiate this template by selecting **OK**.

The revised order details are generated and sent to the external systems through the configured integration. To learn more, see Integrating Order Management with southbound external systems.

Related topics

Configuring Order Management

Order management

Service Order Management workspace fields

The Service Order Management workspace form enables you to select service orders for review and modification.

Tile	Description
New Orders	Number of new service orders that require review. **1.** Select this tile to see the New Order list. **2.** Select the new order you want to review.
Open Tasks	Number of open service order tasks that require review and action. **1.** Select this tile to see the Open Tasks list. **2.** Select the open order task you want to review. To learn more, see Review and update the service order fulfillment tasks.
Unassigned Tasks	Number of unassigned service order tasks that require assignment and action. **1.** Select this tile to see the Unassigned Tasks list. **2.** Select the unassigned order task that you want to review. To learn more, see Review and update the service order fulfillment tasks.
Open Fallouts	Number of open fallout records. **1.** Select this tile to see the Open Fallouts list. **2.** Select the fallout record that you want to review. To learn more, see Update a fallout record.
Open Service Orders	Pie chart that indicates the number and percentage of service orders that are in process or in the process of cancellation.

<table>
<tr><th>Tile</th><th>Description</th></tr>
<tr><td></td><td>Select this tile to see the Current Service Order list.
Select the service order that you want to review.</td></tr>
<tr><td>Service Order Fulfillment Trend</td><td>Number of service orders that were fulfilled during the last four months.</td></tr>
<tr><td>My Active Tasks</td><td>Listing of the active service order tasks that are assigned to the logged in user. The following information appears:
Number
Unique system-assigned task number that starts with a prefix of TASK.
Priority
Relative priority or importance of the active task.
1-Critical
Task with urgent time criticality that requires immediate attention.
2-High
Task with high time criticality, though not as urgent as a Critical priority order task.
3-Moderate
Task with medium time criticality and urgency.
4-Low
Task with low time criticality and urgency.
Short description
Short description of the task.
State
Current state for the task.
Open
Processing for the task is open, and no processing is taking place.</td></tr>
</table>

Tile	Description
	In Progress Processing for the task is still in progress or in fulfillment. **Closed Complete** Processing for the task is complete. It is a system-assigned state. **Canceled** Processing for the order task was canceled.

Creating, reviewing, approving, and fulfilling service orders

Service Order Management (SOM) is a domain of order management that is responsible for the end-to-end life cycle of service requests. Learn how service orders are captured Order Management, and how your fulfillment managers and agents review, orchestrate, and fulfill them.

Service order capture

Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates. By using this process, you ensure that service orders are correct and handled efficiently throughout the entire fulfillment process.

Most of the service orders that you process are captured from third-party customer order management systems through the Service Order Open API. The Service Order Open API is a ServiceNow implementation of the TM Forum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API.

Service order direct entry

You can also use Order Capture as needed to directly enter service orders into the ServiceNow AI Platform.

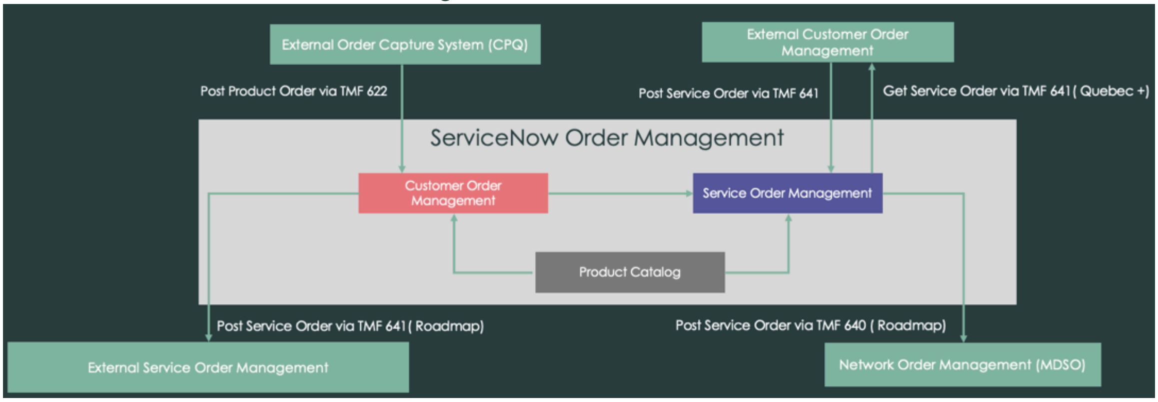
Post-capture service order record generation

When you capture or directly enter a service order, a service order record is generated in the ServiceNow AI Platform to manage service order fulfillment. It has one or more associated service order line items that describe a service and the action (Add, Change, or Disconnect) that is required to perform for the service. The service order line item also consists of the following:

- The details of the services that are being added, updated, or deleted.
- For Add new service activations, the details of the service specification, including the required characteristics and characteristic values.
- For Change and Disconnect service orders, the details of the service inventory that you're updating or disconnecting.
- The location and related information such as the customer contact details.

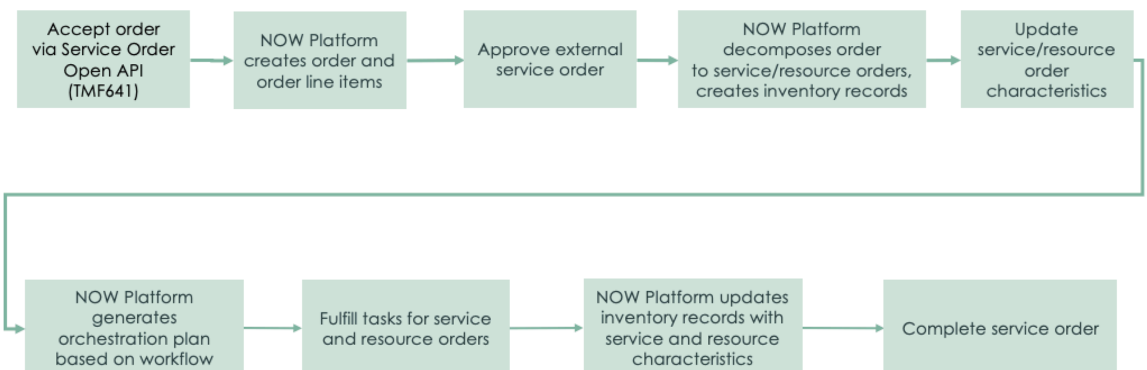
The following diagram provides you with an understanding of how Service Order Management relates to external capture systems.

Customer and service order management



The following diagram provides you with an understanding of what processing takes place when you capture a service order. The processing flow for service orders is similar to that for customer orders, but with some differences that you will learn about in this section.

Service order fulfillment workflow example



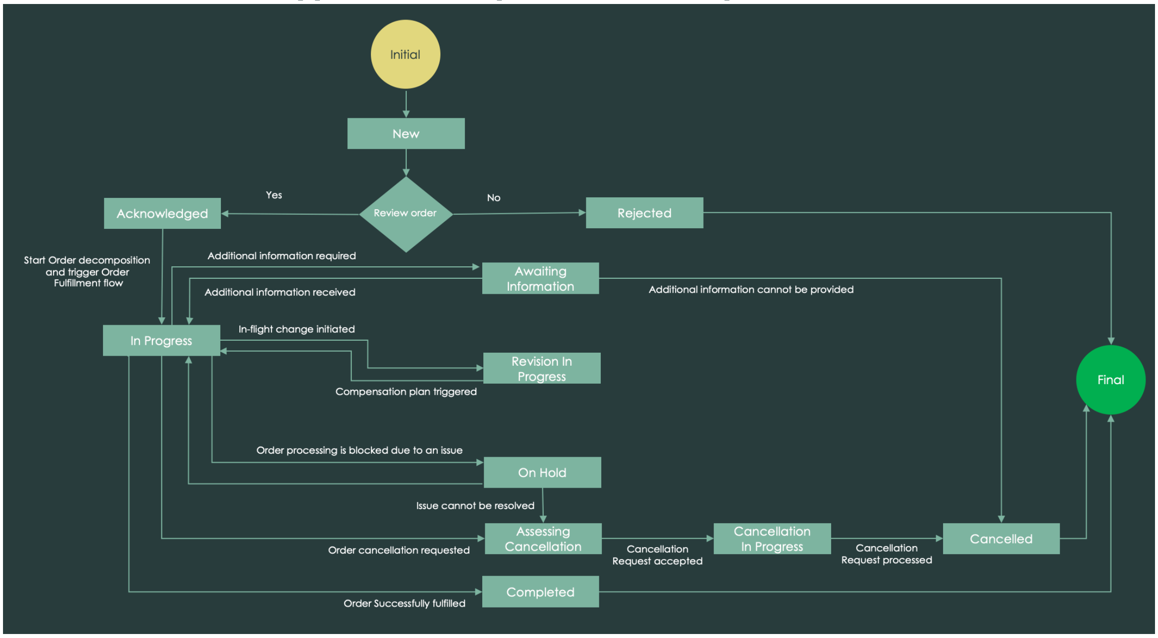
Service order review, approval, and decomposition

After you capture a service order, the service order manager selects it in the Service Order Management workspace in Configurable Workspace Home. The service order manager verifies the service order, the service order line items, and the order characteristics, and then approves or rejects the service order.

Note: To process service orders, the service order manager uses the same forms that are used to manage customer orders. To learn more about service order management roles and the approval process, see the Reviewing service orders for fulfillment.

The following diagram details the service order review, approval, decomposition, and completion process.

Service order review, approval, decomposition, and completion



If the service order manager rejects a service order because the data is incorrect or invalid, the following occurs:

- The state of the service order moves to Rejected.
- The service order may require several changes from the service order manager to bring it back to a normal state.

If the service order manager approves a service order, the following process occurs:

- The **State** field changes to In Progress.
- Service order decomposition takes place next. Decomposition is based on the service specification, specification relationships, and decomposition rules in the catalog. This process creates all required service and resource orders for each approved service order line item and then triggers the order fulfillment workflow for each domain order.
- To learn more, see the following:
  - Create specification relationships, quantity mapping, and decomposition rules for Order Management
  - Approving and fulfilling service orders
  - Service order decomposition

Differences between the pre- and post-approval service orders

Like customer orders, captured service orders also have an ID with a prefix of ORD(nnn). The **Order Category** field in the order forms indicates if the order is for a **Product** (a customer order) or a **Service** (a service order). These labels enable you to identify the type of order.

When you approve a captured service order for fulfillment, the post-approval decomposition process generates actionable service orders and resource orders. You may see a single service order, multiple service orders, and resource orders that are associated with your approved service order.

- Service orders with a prefix of SO(nnn) are referred to as domain orders. These orders, and their related resource orders, with a prefix of RO(nnn), must be fulfilled to complete the service order line items on the captured service orders.
- The resource order manages the resources required to fulfill the services that the customer is requesting.
- These domain orders manage the fulfillment of the requested service orders.

To learn more, see Service order decomposition.

Service order fulfillment tasks

After the decomposition process is complete, order tasks are assigned to a service order agent, who works through the tasks and updates the service order. If there are any remaining order tasks that can't be completed, you can create fallout records for tracking and further research. To learn more, see Creating, reviewing, approving, and fulfilling service orders.

After all fulfillment tasks are complete, the following actions occur:

- The **State** field for the service order is set to Closed complete.
- The **State** field for each of the individual service order line items is set to Completed.
- The sold product record is updated with the state of Active for Add type service orders or Inactive for disconnect type service orders.
- All characteristics of the service and resource specifications are updated in the Product Characteristics [sn_ind_tmt_orm_product_characteristics] table.

Note: For more information, see Review and update the service order fulfillment tasks.

Related topics

Configuring Order Management

Creating orders for services, service changes, or disconnects

With Order Capture, your service agents can directly enter multi-site service orders with one or more services on behalf of your customers. They can also manually create service change requests and disconnect orders in the ServiceNow AI Platform. Order Capture is supported in the San Diego release and later releases.

Note: To learn more about creating customer (product) orders in Order Capture, see Methods of creating orders in Sales Customer Relationship Management.

When to use Order Capture for a direct service order entry

Most service orders that you process in the ServiceNow AI Platform are automatically captured from third-party order management systems through the Service Order Open (TMF641) API.

Your agents can use Order Capture to create manual service orders with additional services that have been identified as customer needs during order fulfillment. They can also create orders to change or disconnect services. When you create a manual service order, the following actions occur:

1. You select and configure the service specifications and then perform reviews before submission.
2. When you submit the service order, the ServiceNow AI Platform creates a service order record to manage the order fulfillment. A service order has one or more associated order line items that describe the services being performed.

3. To review or modify a service order after you have submitted it, use the same procedures that you use for all other orders, regardless of their origin. To learn more, see Reviewing service orders for fulfillment.

4. After the service managers complete their order review, they can approve (or reject) the order for fulfillment by service agents. To learn more about reviewing and fulfilling service orders, regardless of their source of origin, see Approving and fulfilling service orders.

Ordering a service

As a provider, use Order Capture to create a service order in the ServiceNow AI Platform for your consumers or internal personnel.

Before you begin

Complete the following configuration tasks before you use Order Capture:

1. Assign the order fulfillment and provider roles to your users.
2. Define and publish your customer-facing service specifications.
3. Configure order fulfillment.

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

Here's how a service order is created:

1. In the Create Order form, you select the **Service** order type, and then select a customer account and contact.
2. In the Select Service form, you select one or more service specifications and destination locations for the service order.
3. In the Configure Service form, you configure each service order line item, apply those service configurations to one or more locations, and then configure the ordered service configurations by location.
4. In the Review Order form, you review and submit the service order.
5. A service manager can now review and approve it for fulfillment. To learn more, see Creating, reviewing, approving, and fulfilling service orders.

When you directly enter a service order, it creates a service order record in the ServiceNow AI Platform to manage the service order fulfillment. A service order has one or more associated order line items, which describe the services being performed.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Access Order Capture from the **Configurable Workspace Lists** tab.
3. Depending on whether you're creating an order for an existing customer account, or first creating a customer account before you create the order, you can select one of the following actions.

	Description
Create an order for an existing customer ac count	**a.** From the **Configurable Workspace Lists** tab, select **Customer Orders** or **Service Orders**. **b.** Select **All** or select **Open**. **c.** To create order, select **New**.
Create a customer account before creating the order	**Note:** Most of the customer accounts in Order Management for Telecommuni cations, Media, and Technology are ex isting accounts that have been import ed into the ServiceNow AI Platform from external order management systems via APIs. To learn how to create new customer accounts, see Configure ac in Customer Ser in Customer Ser vice Management (CSM).

4. When the Choose an order type dialog appears, select **Order a new service** and select **Create**.

Change a service order inventory record

As a provider, learn how to change a service order inventory record in the ServiceNow AI Platform for your consumers.

Before you begin

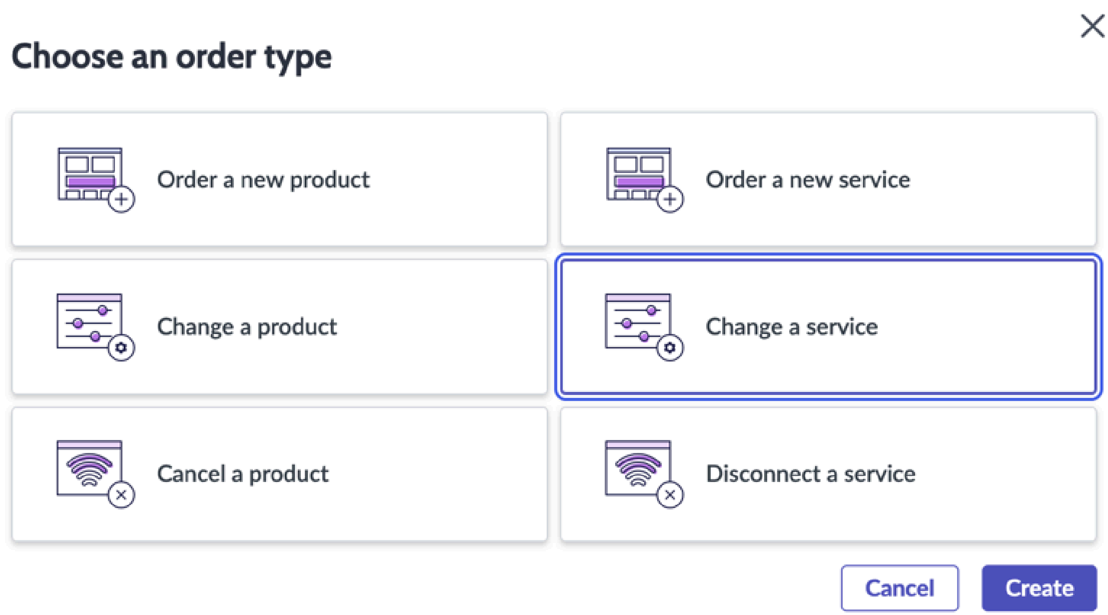
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. To change a service order inventory record for an existing customer account, do the following actions:
   a. From the **Configurable Workspace Lists** tab, select **Service Orders**.
   b. To select all orders, select **All** or to select an order, select **Open**.
   c. Select **New**.

3. When the Choose an order type dialog appears, select **Change a service** and select **Create**.

Choose an order type dialog



Disconnect a service

As a provider, disconnect a service, or service order, in the ServiceNow AI Platform for your customers. For example, you might want to disconnect your current 4G connectivity to upgrade it to 5G connectivity.

Before you begin

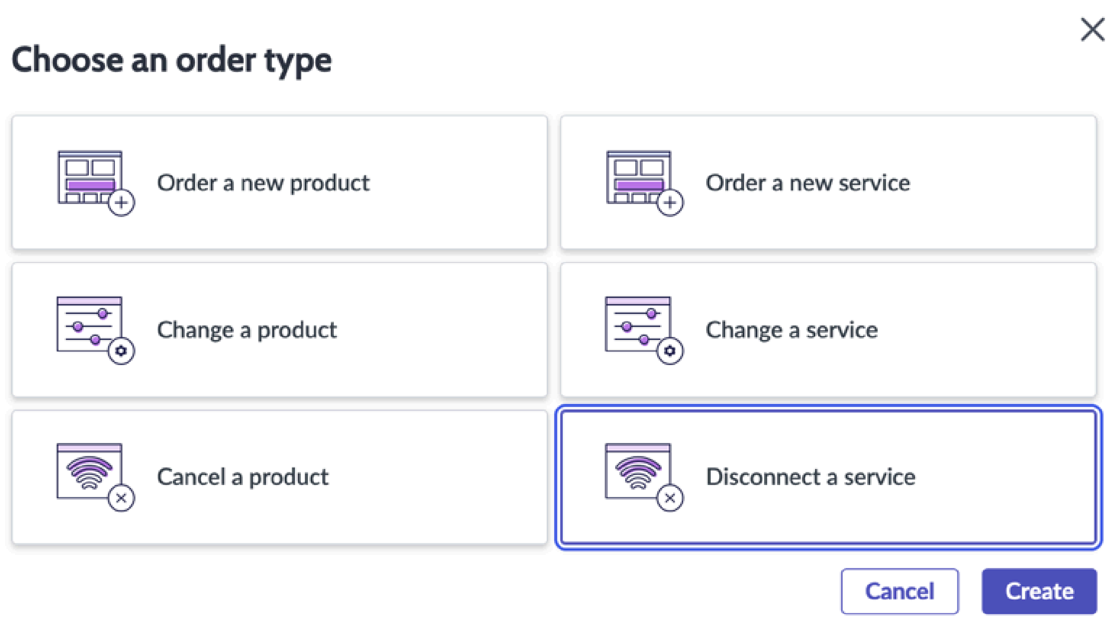
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. To cancel a service order inventory for an existing customer account, do the following actions:
   a. From the **Configurable Workspace Lists** tab, select **Customer Orders**.
   b. To select all orders, select **All** or to select an order, select **Open**.
   c. Select **New**.

3. When the Choose an order type dialog appears, select **Disconnect a service** and select **Create**.

Choose an order type dialog



Reviewing service orders for fulfillment

Learn how your order fulfillment manager can review service orders for fulfillment by using the Order Management application. With this application, you can make sure that your service orders are fulfilled correctly.

Service order review and approval tasks

After the ServiceNow AI Platform captures a service order, the service order manager selects and verifies the order, line items, and characteristics data, and then approves or rejects it. Learn how this process triggers the order fulfillment flow and creates the required tasks to fulfill the service order.

Service order review and approval tasks

Task	Description
1. Select a telecommunications service order.	Review the account, contact, and date details to make sure it is correct and complete. You can also revise or request a cancellation of the service order.
2. Review the service order line items.	For each order line item, make sure that the **Location** field is properly populated in each service order line item.
3. Review and update contact information for the service order line item.	Ensure all associated customer contact information is correct for the selected service order line.
4. Review the product specifications that are associated with the service order line item.	Update the customer line item as needed. A product specification is a template that

Service order review and approval tasks (continued)

Task	Description
	you can use to define, at a functional level, a product that a provider sells to the customer.
5. Review order characteristics for the service order line item.	Ensure that the customer's selections are correct.
6. After you're satisfied that all order details are correct, approve the service order for fulfillment processing.	In the service order form, click **Approve.** **Note:** If you and your enterprise customer are using Service Exchange, a message appears that states the customer's instance has been updated accordingly. Only service order managers with an assigned [sn_ind_tmt_orm.service_order_manager] role can approve service orders.
7. Perform the tasks required for post-approval service order fulfillment.	Ensure that the service order is properly fulfilled.

Select, review, revise, or request cancellation of a service order

Review the account, contact, pricing, and date details on a telecommunications service order to make sure that it is correct and complete. You can also revise or request a cancellation of the service order.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All** > **Service Order Management** > **Workspace** > **Configurable Workspace Home**.

   Note: If you aren't using configurable workspaces, navigate by using the following path:

   Workspace Experience > **Workspaces** > **Agent Workspace Home**.

   To learn more about migrating to configurable workspaces, see Migrate to Configurable Workspace.

   If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

   a. From the Configuration Workspace Lists icon ☰, click **Service Orders**.

   b. Do one of the following:

   - To view all service orders, click **All**.
   - To view only open, unfulfilled service orders, click **Open**.

   Note: To learn more about creating or updating service order details, see Creating orders in Order Management.

c. Select the service order that you want to review, verify, and approve:

- To refresh the form, click the refresh icon .
- To filter existing service orders, click the filter icon .

2. Select the service order to review by clicking the appropriate tile.
3. On the Customer Order form, review the order number, account, and contact information for the selected service order.
4. To revise or request cancellation of the service order, perform one of the following actions.

Action	Description
Revise a customer or service order	In the Customer Order form, do the following actions: **a.** Click **Revise Order**. **b.** Make the required revisions to the order. **c.** When the Confirmation dialog appears, click **OK**, or click **Cancel** to skip the revision of the order. **Note:** If the **PONR** option is selected, the **Revise Order** button is turned off be cause it is too far along in the process to revise. When you revise an order, the following ac tions take place: ◦ The **State** field changes to Revision Re ceived. ◦ The **Version** field increments to the next version number. ◦ The **Revision Operation** field is set to Up date. ◦ If there are any associated order tasks, their state fields change to On Hold.
Revise a customer or service order line item	In the Order Line Items form, do the following actions: **a.** Using the check boxes to the left of the or der lines, select those that require revision. To revise all order line items, select the check box to the left of the **Number** title. For example, if your order consists of four line items, you could select single individ ual line items, or all items for revision. **b.** Make the required revisions to the order line item.

Action	Description
	c. Click **Revise Order Line**. **d.** When the Confirmation dialog appears, click **OK**, or click **Cancel** to skip the revision of the order line item. **Note:** If the **PONR** option is selected, the **Revise Order** button is turned off because it is too far along in the process to revise. When you revise an order line item, the following actions take place: ◦ The **State** field changes to Revision Received. ◦ The **Version** field increments to the next version number. ◦ The **Revision Operation** field is set to Update. ◦ If there are any associated order tasks, their state fields change to On Hold.
Request cancellation of an entire customer or service order	In the Customer Order form, do the following actions: **a.** Click **Cancel Order**. **b.** When the Confirmation dialog appears, click **OK**, or click **Cancel** to skip the cancellation request. **Note:** If the **PONR** option is selected, the **Cancel Order** button is turned off because it is too far along in the process to request a cancellation. When you request an order cancellation, the following actions take place: ◦ The **State** field changes to Assessing Cancellation. ◦ The **Version** field increments to the next version number. ◦ The **Revision Operation** field is set to Cancel. ◦ Notification messages appear if there are any conditions that are preventing cancellation of the order. A designated manager must approve the order cancellation.

Action	Description
	Note: To cancel an individual order line item, in the Order Line Item form, change the **State** field to Assess Cancel lation.
Request cancellation of individual cus tomer or service order line items	In the Order Line Item form, do the following actions: **a.** Click **Revise Order**. **b.** Make the required revisions to the order line item. **c.** When the Confirmation dialog appears, click **OK**, or click **Cancel** to skip the revision of the order line item. **d.** Click **Cancel Order Line Item**. **Note:** The **PONR** check box, which is located on the Customer Order and Or der Line item forms, indicates the Point of No Return state for the order or order line item.

Note: To learn more about inflight order changes, see Managing inflight order changes and cancellation requests.

5. In the service order, make the required changes, and then select **Save**.

Reviewing service order details

Review the account, contact, dates, line items, and related details on the selected service order to make sure that everything is correct and complete. You perform these tasks in the same Customer Orders form that you use to review customer orders.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. To review the service order and date details for the entire service order, click **Details**.
    - To show the Details pane in the full screen, click the show form in full screen icon.
    - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon (default).
    - To show the Activity pane in the full screen, click the show activity in full screen icon.
2. In the Details pane, review the general details for the service order.
3. Review the remaining details for the service order.
4. Review the line items, characteristics, and fulfillment tasks for the service order.

Task	Description
Review the order line items and related details	See Review the line items and related details for a service order.
Review the order characteristics	See Review and update the characteristic values on a service order.
Review the order fulfillment tasks	See Review and update the service order fulfillment tasks.

5. When you finish reviewing and updating the entire service order, perform one of the following actions.

Action	Description
Save the updated service order	Select **Save**.
Approve the service order	Select **Approve**. To learn more, see Reviewing service orders for fulfillment. **Note:** Only service order managers with an assigned [sn_ind_tmt_orm.service_order_manager] role can approve service orders.

Review the line items and related details for a service order

Review the line items and the related details of the selected service order to make sure that all line items and details are correct and complete. The related details include the service order line item characteristics and contacts.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

By using the Order Line Item and Order Characteristic forms together, you can do the following actions:

- View an existing service order line item.
- View, add, change, or delete a new characteristic of a service order line item. To learn more, see Select, review, revise, or request cancellation of a service order.

Procedure

1. Navigate to **All** > **Service Order Management** > **Workspace** > **Configurable Workspace Home**.

   Note: If you aren't using configurable workspaces, navigate by using the following path:

   Workspace Experience > **Workspaces** > **Agent Workspace Home**.

   To learn more about migrating to configurable workspaces, see Migrate to Configurable Workspace.

If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

a. From the Configuration Workspace Lists icon, click **Service Orders**.
b. Do one of the following:
   - To view all service orders, click **All**.
   - To view only open, unfulfilled service orders, click **Open**.

   Note: To learn more about creating or updating service order details, see Creating orders in Order Management.

c. Select the service order that you want to review, verify, and approve:
   - To refresh the form, click the refresh icon.
   - To filter existing service orders, click the filter icon.

2. In the Service Order Management workspace, to select the service order, click the appropriate tile.
3. After selecting and opening the service order in the Customer Order form, click **Order Line Items (n)** to view the service order line item details.
(n) represents the number of the total number of line items for the service order. The Order Line Items form appears.
4. In the **Order Line** field, select an existing service order line item to review.
5. On the form, review the details for the selected service order line item.
6. To save any updates that you made to the service order line item, click **Save**.

What to do next

As needed, review and update the related contact, order characteristic values, and order tasks.

Note:

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see Managing order fallout.

Review and update the characteristic values on a service order

Review and update the characteristic option values that are associated with a service order to make sure that the customer's selections are correct.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

Service specifications have a set of related characteristics and characteristic options. The characteristics are generic and are associated to one or more service or resource specifications. Each characteristic has a certain input type (check box, list, attachment) and can have one or more characteristic options. To learn more, see .

Procedure

1. To view the order characteristic values that are associated with a service order line item, locate the service order line item that you want to view.
   To learn more, see Review the line items and related details for a service order.
2. Select **Order Characteristics (n)**, where (n) is the number of service characteristics that are associated with the selected service order line item.
3. On the form, review the service order characteristics values and update as needed.

   For information about the field descriptions, see Order Characteristics form.
4. When you finish reviewing and updating the service order characteristics, perform one of the following actions.

Action	Description
Save the updated service order characteris tics	Select **Save**.
Delete the service order characteristics	Select the options icon (*** next to the **Save** button, and then click **Delete**.

Review and update the contacts for a service order line item

Review and update your customer's current contact information that is associated with a service order line item so that you can make sure that your customer's information is correct.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

You can also add, change, or delete customer contacts as needed.

Procedure

1. To view the customer contacts that are currently associated with a service order line item, locate the service order line item that you want to view.
   To learn more, see Review the line items and related details for a service order.
2. Select **Order Line Item Contacts**.
3. On the form, fill in the fields.

Order Line Item Contacts form

Field	Description
First Name	First name of the customer contact.
Last Name	Last name of the customer contact.
Business Phone	Business phone number for the customer contact.
Email	Email address for the customer contact.

4. To add or delete a service order customer contact, perform one of the following actions.

Action	Description
Add a service order customer contact	a. Select **New**. b. Add the name, business phone number, and email address. c. Select **Save**.
Delete a service order customer contact	Select the options icon ••• next to the **Save** button, and then select **Delete**.

Approving and fulfilling service orders

Learn how your organization can perform post-approval service order fulfillment. By using this application, you can ensure that your service orders are fulfilled correctly.

Your service order manager and order fulfillment agent must do the approval and fulfillment tasks that are described in the following table.

Post-approval service order processing tasks

Task	Description
Review a service order and approve or reject it for fulfillment.	A service order manager approves or rejects a service order for fulfillment. If it's approved, the sold product and order decomposition processing can take place. If it's rejected, more investigation is needed. To learn more, see: • Approve or reject a service order for fulfillment • Sold product creation for service orders • Service order decomposition
Review the service specifications and domain service orders that are associated with the approved service order.	A service order manager reviews the domain service orders that were generated for the service order line item. To learn more, see: • Review and update the service specifications for a service order line item • Review the domain resource orders that are associated with a service order
Use the Orchestration Plan UI to review the domain orders and order tasks that are associated with the approved service order.	A service order manager reviews the orchestration state and hierarchical structure for a selected service order, its associated order line items, domain orders, and order tasks. By using the Orchestration Plan UI, the service order manager can see how much progress has occurred in the fulfillment process. To learn more, see Order fulfillment.

Post-approval service order processing tasks (continued)

Task	Description
Review and update the fulfillment tasks that are associated with a service order.	An order fulfillment or service order agent does the tasks that are required for post-approval customer order fulfillment, including marking the order tasks as complete. The order fulfillment or service manager then creates the order fallout records for the order tasks that can't be completed. To learn more, see: • Review and update the service order fulfillment tasks • Managing order fallout
Follow up on the tasks that couldn't be completed by examining the order fallout records and reassigning them for more investigation.	An order fulfillment or service manager reviews the tasks that couldn't be completed in the order fallout records, and reassigns the order tasks to fulfillment agents for investigation and resolution. To learn more, see, Review a fallout record.

Approve or reject a service order for fulfillment

Select a service order and review the account, contact, and date details to verify that the order is correct and complete. If you're a service order manager, you can approve or reject a service order with a New state for fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

Note: If the following error message appears in the San Diego release or above after approving an order, it indicates that a required upgrade script was not run.

```
Some of the OMT tables need reparenting. Please contact
 administrator to execute the reparenting script.
```

The Post Upgrade Script performs required order management table reparenting and column promotion. If the script hasn't been run, the order decomposition and order fulfillment functions won't function as designed until your system administrator runs it. To learn more, see Restructured Order Management tables.

Procedure

1. Navigate to **All** > **Service Order Management** > **Workspace** > **Configurable Workspace Home**.

   Note: If you aren't using configurable workspaces, navigate by using the following path:

   Workspace Experience > **Workspaces** > **Agent Workspace Home**.

   To learn more about migrating to configurable workspaces, see Migrate to Configurable Workspace.

If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

a. From the Configuration Workspace Lists icon ☰, click **Service Orders**.

b. Do one of the following:

- To view all service orders, click **All**.
- To view only open, unfilled service orders, click **Open**.

Note: To learn more about creating or updating service order details, see Creating orders in Order Management.

c. Select the service order that you want to review, verify, and approve:

- To refresh the form, click the refresh icon.
- To filter existing service orders, click the filter icon.

2. Select the service order to review by clicking the appropriate tile.
3. On the Customer Order form, review the order number, account, and contact information for the selected service order.
4. To approve or reject fulfillment of a service order in a New state, perform one of the following actions.

Action	Description
Approve a customer or service order for fulfillment	In the Customer Order form, do the following actions: a. Click **Approve**. b. Click **Save**. When you approve an order for fulfillment, the following actions take place: ◦ The **State** field changes to In Progress. ◦ The **Revision Operation** field is set to None. **Note:** You must have an sn_ind_tmt_orm.order_fulfillment_manager role.
Reject a customer or service order for fulfillment	In the Customer Order form, do the following actions: a. Click **Reject**. b. Click **Save**. When you reject an order for fulfillment, the following actions take place:

Action	Description
	○ The **State** field changes to In Rejected. ○ The **Revision Operation** field is set to None. **Note:** You must have an sn_ind_tmt_ orm.order_fulfillment_manager role. You can approve an order that you previous ly rejected.

Sold product creation for service orders

Learn how to create and maintain the customer service inventory. By using the Order Management application, you can maintain an accurate information of your customer services.

Sold product creation overview

The sold product configuration stores the service specifications and services, both customer-facing and resource-facing, that are associated with a service order. All characteristics of the service and resource specifications are updated in the Product Characteristics [sn_ind_tmt_orm_product_characteristics] table.

New order workflow

The new order workflow is as follows:

1. After the service order manager approves the service order, the Sold Product [sn_install_base_sold_product] record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the service and resource orders are closed, the state of the associated specification updates to Active in the record.
3. When you close the service order, all the characteristics that are associated with the specifications on the service order update the record.

Change order workflow

The change order workflow is as follows:

1. After the service order manager approves the service order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.
2. During the fulfillment process, when the service and resource orders are closed, the state of the associated specification updates to Active in the Sold Product [sn_install_base_sold_product] record.
3. When you close the service order, all the characteristics that are associated with the specifications on the service order update the record.
4. If the change order included a product that is discontinued, the state of the associated sold product is moved to Closed.

Service order decomposition

Learn how a service order is decomposed into its domain orders for fulfillment.

Decomposition that is based on specification relationships

Specification relationships define the relationships between product, service, and resource specifications. Specification relationships and decomposition rules specify how a service order is decomposed, fulfilled, and delivered to your customer.

Decomposition runs on the specification that is associated with the captured service order line item and its hierarchy of specifications. It works as follows:

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, the product, service, or resource orders are created for the target specification. This action takes place when the captured service order is decomposed.
- Decomposition establishes the hierarchical relationship between the source and targets while generating the service and resource orders.
- Decomposition doesn't happen if the specification relationship is of a Composed of type.

> **Note:** To learn more about specification relationship types, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.

Decomposition that is based on defined decomposition rules

Specification relationships define the relationships between product, service, and resource specifications. When you define specification relationships, you can optionally create decomposition rules. Specification relationships and decomposition rules dictate how a service order is decomposed, fulfilled, and delivered to the customer.

The best way to view a decomposition rule is as an exclusion rule. You use decomposition rules to exclude the creation of domain orders when you receive a service order that doesn't contain a specific characteristic or characteristic option.

For example, in the Managed firewall service demo data, the Managed Firewall service is defined as a customer-facing service specification. It has a relationship with the following three resource-facing service specifications:

- Firewall administrator
- Firewall and DMZ
- Threat and Intrusion Prevention service

Each of these resource-facing service specifications has relationships with the corresponding resource specifications that are required to deliver the Managed Firewall service.

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, decomposition creates the following types of orders for the target specification:
  - A corresponding customer-facing service order (CFS), which is a service order that is generated for performance of customer-faced services.
  - A resource-facing service order (RFS), which is a service order that is generated for internal use of resources required to perform the actual services for the customer.
  - Resource order.
- Decomposition establishes the relationship between the source and targets while generating domain service orders and resource orders. The following elements comprise the specification relationship:

- The source specification is the specification that is defining the specification relationship.
- The target specification is the specification that the relationship is being defined to.
- Both values are automatically defined when the decomposition rule was created for the specification relationship.

Optional decomposition rules are defined for a specification relationship between a source specification and a target specification. The rules use the characteristic and characteristic value (optional) of a source specification, for mapping to a target specification. These rules enable targeted order decomposition of a source specification that is based on the characteristic and characteristic value available in the source specification.

Note: To learn more about specification relationships and decomposition rules, see Create specification relationships, quantity mapping, and decomposition rules for Order Management.

Reviewing the domain service orders that are associated with a service order line item

Review the domain service orders that were generated for a selected service order line item so that you can make sure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

The domain service orders manage the fulfillment of the services that you're rendering for the product the customer requested service for.

Procedure

1. To view the service orders that are associated with an order line item, select the order line item.
2. Select an existing service order to review or create a service order.

Task	Action
Review an existing service order	**a.** To access the Service Orders form, click the **Service Orders (n)** tab (where (n) is the number of service orders that are associat ed with the selected product order). **b.** In the **Number** field, select an existing ser vice order to review. ◦ To refresh the form, select the refresh icon . ◦ To filter the existing service orders, select the filter icon .
Create a service order	Select **New**.

3. On the form, add a service order, or review the selected service order details and update as needed.

- To show the Details pane in the full screen, click the show form in full screen icon.
- To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon (default).
- To show the Activity pane in the full screen, click the show activity in full screen icon.

4. When you finish reviewing and updating the service order, perform one of the following actions.

Action	Description
Save the updated service order	Select **Save**.
Delete the service order	Select the options icon next to the **Save** button, and then select **Delete**.

Review and update the service specifications for a service order line item

Review and update the service specifications for a service order line item so that you can make sure that the specifications are correct and complete. A service specification is a template that you can use to define, at a functional level, a product that a service provider sells to the customer.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

To learn more about product specifications, see .

Procedure

1. To view the service orders for a customer line item, select the order line item.
2. In the **Service Specification** field, select a service specification to review.
   When you select a service specification, the service specification form appears.
3. On the form, review the service specification, and update as needed.
4. When you finish reviewing and updating the service order service specification, perform one of the following actions.

Action	Description
Save the updated service order service specification	Select **Save**.
Delete a service order service specification	Select the options icon (next to the **Save** button, and then select **Delete**.

Review the domain resource orders that are associated with a service order

Review the domain resource orders that were generated for a selected service order line item so that you can ensure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

The domain resource orders manage the resources required for fulfillment of the services that you are rendering.

Procedure

1. To view the resource orders that are associated with an order line item, select the order line item.
2. Select an associated resource order to review or create a resource order.

Task	Action
Review an existing resource order	**a.** To access the Resource Orders form, click the **Resource Orders (n)** tab (where (n) is the number of resource orders that are as sociated with the selected resource order) **b.** In the **Number** field, select an existing re source order to review. ○ To refresh the form, click the refresh icon . ○ To filter existing resource orders, click the fil ter icon .
Create a resource order	Click **New**.

3. On the form, add a resource order, or review the selected resource order detail and update as needed.
4. When you finish reviewing and updating the resource order, perform one of the following actions.

Action	Description
Save the updated resource order	Click **Save**.
Delete the resource order	Click the options icon next to the **Save** but ton, and then click **Delete**.

Review and update the service order fulfillment tasks

Review and update the fulfillment tasks that are associated with a service order, or order orchestration plan, so that you can make sure that all tasks are properly completed.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

If you encounter issues with resolving or completing an order task, you can create fallout records. Fallout records enable you to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On hold. A work order note with the message A `fallout record FOnnnn has been created` also appears.

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see Managing order fallout.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab, select **Order Tasks**.
   a. Do one the following options:
      - To view all open order tasks, select **All**.
      - To view only the tasks that are assigned to you, select **My Tasks**.

   b. Select the order task that you want to work on.

   Note: You can also directly access the task records for an order from the Orchestration Plan UI. To learn more, see Review an order orchestration plan.
3. For each order task, set the status and update the work notes, as required.
4. On the form, review the order task details and update as needed.

   For information about the field descriptions, see Order Tasks form.
5. When you finish reviewing and updating the order task, or encounter issues preventing its closure, do one of the actions in the following table.

Action	Description
Save the updated order task	Select **Save**.
Delete the order task	Select the options icon next to the **Save** button, and then select **Delete**.
Create a fallout record	Select the options icon next to the **Save** button, and then select **Create Fallout**. To learn more, see Create a manual fallout.

Result

After your agents complete all fulfillment tasks for the entire service order, the following actions occur:

- The **State** field for the customer order is automatically set to **Completed**.
- The **State** field for each of the individual customer order line items is set to **Completed**.

Service Exchange

ServiceNow® Service Exchange connects multiple ServiceNow instances to provide seamless support and service experiences across the ecosystem, from enterprise customers to suppliers and system integrators. Service Exchange provides a frictionless experience that makes it easy to collaborate and process requests while giving users the convenience of working in their own ServiceNow instance.

Get started

Explore

Learn about the benefits of Service Exchange and how it is used.

Configure for providers

Learn how to install and configure Service Exchange for providers.

Configure for consumers

Learn how to install and configure Service Exchange for consumers.

Integrate

Extend Service Exchange capabilities by integrating with other applications.

Create remote record producers

Offer catalog items to a consumer using remote catalog.

Configure outbound FDS for providers

Configure outbound foundation data sync (FDS) settings for provider instances.

Configure outbound FDS for consumers

Configure outbound foundation data sync settings (FDS) for consumer instances.

Create remote task definitions

Create remote task definitions to define the task types that can be shared across connected instances.

Service Exchange data model

Explore the tables and access control rights used in the Service Exchange data model.

Reference Get additional details about Service Exchange, including data model, error log, and cloning instances.		

Additional resources

- Learn more about what's new and changed, see the Service Exchange (formerly Service Bridge) release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Connect with other Service Exchange users at Now Community.
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- View KB articles at Service Exchange Knowledge Base.
- Access Service Exchange product page from Service Exchange product.

Service Test Management

Define tests, set measurable thresholds, and monitor real-time execution with accuracy using the ServiceNow® Service Test Management application. Streamline your testing process to improve performance, ensure reliability, and deliver consistent results in every scenario.

Get started

The Service Test Management product enables the you with the ability to precisely define, execute, and monitor service tests in real-time. This advanced system enables customers to create detailed test specifications, establish test measures, and set threshold rule violations that can be utilized by agents for instantaneous testing and diagnostics. Technology, media, and telecommunications (TMT) service providers can use this application where proactive and reactive service testing is critical.

Additional resources

- Log in to your ServiceNow® account and find additional information about implementing and deploying Technology Product Support case features at Now Create.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- 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 Technology Product Support case users at Now Community.

Setting up a test group

Define tests for a particular service type, product model, or inventory to troubleshoot the service-related problems.

Test group includes relationships and measure consequences. These entities enable the system to trigger relevant tests for the service problem that help to identify the root-cause of the problem. You can define these entities for each test based on your requirements. The test group contains multiple test definitions.

Customers can set up Test groups as either manual or automated:

- For manual types, one or more Test definitions must be attached to the Test group.
- For automated types, you must create a Sub flow with a list of steps and add it to the group.
- If customers want test diagnostics to run automatically and provide results directly to the agent, they can create a flow with specific trigger conditions. When a task meets these conditions, the flow runs automatically and displays the test results for the task. This may affect system performance.
- The demo subflow with the demo data for the automated test group is provided. This demo flow can be used as a reference for creating subflow for new automated test groups.

Create a test group

Create a test group to combine various tests that can assist in troubleshooting issues encountered by specific types of services or product models. For instance, grouping a speed test and a ping test together can effectively help in diagnosing internet-related problems.

Before you begin
Role required: sn_st_mgmt.test_def_creator

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Groups** > **All**.
2. Select **New**.
3. On the form, fill in the fields.

Service Test Groups

Field	Description
Number	Auto-generated ID for the test group.
Name	Name of the test group.
State	State of the test group. **Draft** Unpublished draft service test group that is assigned when you first create the group record. **Published**

Field	Description
	Published service test group that is assigned when you formally publish it for use. The service test group and the related tables can't be modified in the published state. **Retired** Service test group that is retired.
Execution Type	Execution type of the test group. **Manual** The test definitions can be mapped to the test group in the related list. **Automated** A subflow has to be created and mapped to the automated test group.
Description	Description for the test group.

4. Select **Submit**.

Associate a test group with a specification or product model

Establish a relationship between test groups and their respective specifications or product model to determine the tests that must be executed for a given inventory. This relationship confirms that the appropriate tests are identified and executed based on the defined specifications. Without this association, the system can't accurately assign the necessary tests for each inventory item.

Before you begin

Role required: sn_st_mgmt.test_def_creator

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Groups** > **All**.
2. Select the test group that you want to open.
   Only the published test groups are displayed in the list.
3. In the Specification or product model to Test Group Relationship related list, define a relationship by selecting **New**.
4. On the form, fill in the fields.

Specification to Test Group Relationship

Field	Description
Specification	Name of the specification.
Product model	Name of the inventory.

Field	Description
Test Group	Auto-populated name of the test group for which you're specifying a relationship.

5. Select **Submit**.

Publish a test groups

Publish the test groups to ensure that agents only see the approved versions of test groups for execution. This also helps maintain consistency and control over both current and future test versions.

Before you begin

You must ensure that the characteristic and its options are added to the test group for successful publishing and operation of the tests.

Role required: sn_st_mgmt.test_def_manager

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Groups** > **All**.
2. Select the test group that you want to publish.
3. Select **Publish**.

Result

The test group is published and its state changes from Draft to Published.

Setting up test definitions

Define tests for a particular service type, product model, or inventory to troubleshoot the service-related problems.

Test definition includes characteristics, relationships, test measures definitions, measure consequences, and threshold rules. These entities enable the system to trigger relevant tests for the service problem that help to identify the root-cause of the problem. You can define these entities for each test based on your requirements.

A service test definition outlines the parameters to be configured and the metrics to be measured for a given service test. These parameters are defined in the test definition. They can be set during execution to run the tests that measures the service problem effectively. This structured approach confirms that the test is done correctly and collects all the data needed to identify the problem of the service.

Create a test definition

Create a test definition to define tests that can help troubleshoot a problem encountered by a particular type of service or product model. For example, use a speed test to troubleshoot the internet-related issues.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select **New**.
3. On the form, fill in the fields.

Service Test Definition

Field	Description
Number	Auto-generated ID for the test definition.
Name	Name of the test definition.
Owner	Name of the person who is responsible for maintaining this definition.
State	State of the test definition. **Draft** Unpublished draft service test definition that is assigned when you first create the definition record. **Published** Published service test definition that is assigned when you formally publish it for use. The service test definition and the related tables cannot be modified in the published state. **Retired** Service test definition that is retired. **Archived** Service test definition is no longer used in diagnosing process.
Published on	Date on which the test definition is published.
Retired on	Date on which the test definition is retired.
Description	Description for the test definition.

4. Select **Submit**.

Define a characteristic for the test definition

Add a characteristic for a test to determine the properties that are required to run and evaluate the test.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to open.
3. In the Test Definition Characteristics related list, add a characteristic by selecting **New**.
4. On the form, fill in the fields.

Test Definition Characteristics

Field	Description
Characteristic	Service or product characteristic of the test that helps determine the effectiveness of the defined characteristic. In the test definitions, the characteristics of type attachment and duration aren't supported. For example, if you select download speed characteristics for the speed test definition, the system tests the downloading speed to troubleshoot the issue raised due to internet outage.
Characteristic option	Characteristic options for a characteristic.
Test definition	Auto-populated name of the test definition for which you're defining the characteristics.

5. Select **Submit**.

Define the relationship between the test definitions

Define relationships for a test definition to connect and associate it with other test specifications. This process ensures comprehensive testing coverage and that the tests are aligned with the testing goals.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to open.
3. In the Test Definition Relationships related list, define a relationship by selecting **New**.
4. On the form, fill in the fields.

Test Definition Relationship

Field	Description
Number	Auto-generated ID for the test specification.

Field	Description
Test definition	Auto-populated name of the test definition for which you're defining a relationship.
Related test definition	Name of the other test definition that you want to connect this test with. **Note:** Ensure that the selected test definition is different from the one for which the relationship is being established. The association between the test definitions should be unique and either in a published or draft state.
Type	Type of relationship defined in with the related test definition, such as dependency.
Order	Order in which this test is executed.

5. Select **Submit**.

Define test definition relationships with specifications

Establish a relationship between test definitions and their respective specifications or product model to determine the tests that must be executed for a given inventory. This relationship ensures that the appropriate tests are identified and executed based on the defined specifications. Without this association, the system can't accurately assign the necessary tests for each inventory item.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to open.
3. In the Specification or product model to Test Definition Relationship related list, define a relationship by selecting **New**.
4. On the form, fill in the fields.

Specification to Test Definition Relationship

Field	Description
Specification	Name of the specification.
Product model	Name of the inventory.
Test Definition	Auto-populated name of the test definition for which you're specifying a relationship.

5. Select **Submit**.

Define test measure definitions for a service test

Define unique test metrics, such as parameters and criteria to run the test on a given service during testing. These metrics help promote that the service meets the desired standards and requirements to provide a satisfactory user experience.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Groups** > **All**.
2. Select the test group that you want to open.
3. In the Test Measure Definitions related list, define test measures for the service by selecting **New**.
4. On the form, fill in the fields.

Test Measure Definition

Field	Description
Number	Auto-generated ID for the test measure definition
Name	Name of the test measure definition.
Metric name	Unique name for the metric definition.
Value type	Type of characteristic value. Data type: String
Unit of measure	Measurable value used to calculate the performance of a service, such as seconds, minutes, days, and more.
Test definition	Auto-populated name of the test specification for which you're defining this test measure.
Capture frequency	Frequency at which test metrics record is refreshed. For example, once, daily, weekly, or monthly.
Capture method	Method to capture the frequency, such as automatic or manual.
Capture period	Period of the capture to calculate the duration, such as days and hours.
Validity start date time	Valid date and time on which the test takes effect.
Validity end date time	Valid date and time on which the test takes expires.
Metric description	Description of the test metrics.

5. Select **Submit**.

Define threshold rules for a test measure definition

Set rules or criteria to evaluate the results of test measures. These rules establish thresholds that determine the acceptable performance and quality metrics for a service under evaluation. If test measure results exceed or fall below these thresholds, it indicates a deviation from expected performance levels.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to open.
3. In the Threshold Rules related list, define a threshold rule for a test measure by selecting **New**.
4. On the form, fill in the fields.

Threshold Rule

Field	Description
Number	Auto-generated ID for the test measure definition.
Name	Name of the threshold rule.
Test measure definition	Name of the test measure definition for which you're defining threshold rules.
Conformance comparator exact	Option to determine if the service under testing meets the defined criteria.
Conformance target exact	Option to determine if the service or system behaves as expected under specified conditions. This field appears only if the **Conformance comparator exact** option is selected.
Conformance comparator lower	Lower range of the threshold for comparing the test measure results.
Conformance comparator upper	Upper range of the threshold for comparing the test measure results.
Severity	Severity of this rule.
Tolerance period	Specified time interval during which crossing occurrences are enabled without triggering any immediate consequences or actions.
Number of allowed crossing	Number of occurrences of a threshold crossing that are allowed within a certain time frame before any consequences are triggered.
Conformance target lower	Lower boundary that determines if a specific limit is crossed or no longer crossed.

Field	Description
	Note: This value must be greater than the upper limit defined in the **Conformance target upper**.
Conformance target upper	Upper limit that determines if the threshold is crossed or no longer crossed. **Note:** This value must be less than the lower limit defined in the Conformance target lower.
Description	Description of the threshold rule.

5. Select **Submit**.

Define measure consequences for the threshold rules

Set actions or responses to trigger when the test measure results fall outside the predefined acceptable limits.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to open.
3. In the Threshold Rules related list, select a threshold rule for which you want to define consequences.
4. In the Test Measure Consequences related list, define consequences for the threshold rules by selecting **New**.
5. On the form, fill in the fields.

Measure Consequences

Field	Description
Number	Auto-generated ID for the measure consequences.
Name	Name of the measure consequence for the threshold rule. For example, send a warning to the system.
Prescribed action	Action that is taken when the threshold rule falls outside its prescribed limit.
Repeat action	Option to repeat the action until the desired result achieves.
Threshold rule	Name of the threshold rule for which you're defining the measure consequences.

Field	Description
Validity start date time	Valid date and time on which the test takes effect.
Validity end date time	Valid date and time on which the test expires.
Description	Description of the threshold rule consequence.

6. Select **Submit**.

Publish test definitions

Publish the test definitions to ensure that agents only see the approved versions of test definitions for execution. This also helps maintain consistency and control over both current and future test versions.

Before you begin
You must ensure that the characteristic and its options are added to the test definition for successful publishing and operation of the tests.

Role required: admin

Procedure

1. Navigate to **All** > **Service Test Management** > **Test Definitions** > **All**.
2. Select the test definition that you want to publish.
3. Select **Publish**.

   Note: After you publish a test definition, you can't change or delete it.

Result
The test definition is published and its state changes from Draft to Published.

Strategic Portfolio Management for Telecommunications

The Strategic Portfolio Management for Telecom is a product that inherits all features of Strategic Portfolio Management along with the addition of two templates for Fiber Rollout and 5G Projects.

Strategic Portfolio Management for Telecommunications enables you to define and customize the tasks and requirements for your Fiber Rollout and 5G projects. A project template defines the basic structure of a project and can include project tasks and subtasks, attachments, checklists, and other project information. Because projects often get repeated, templates enable you to create, save, and reuse project structure. You can also modify existing templates, create projects from templates, and apply templates to empty projects.

Fiber Rollout project template

The Fiber Rollout project template can address challenges customer experience due to disjointed planning, delayed service and network delivery due to manual processes, and delayed service impact analysis. Using this template can improve the fiber rollout process by:

- Accelerating the design process
- Defining and tracking the construction and rollout
- Providing timely notifications regarding the service delivery

5G project template

Using the 5G project template can simplify and streamline the project management process by:

- Proactively identifying project tasks
- Ensuring that all critical steps in the planning process are included
- Allocating appropriate resources for target dates
- Identifying key team members and stake holders
- Reducing delays and cost overruns
- Assessing risks early in the project
- Improving cross team and cross project collaboration

Strategic Portfolio Management for Telecommunications Fiber rollout project template

This template describes the various tasks required for a fiber rollout.

The Fiber rollout project template contains the following basic tasks:

- Plan and build the network
- Network design
- Construction and rollout
- Service delivery and activation
- Customer support
- Service readiness
- Plan for future demand and network build

You can create a project from this template or modify this template according to your requirement. For more details on using project templates, see Project templates.

Telecommunications Customer 360

The Telecommunications Customer 360 application provides a unified interface that aggregates data from multiple systems into a single platform. Telecommunications Customer 360 is a new application in the Australia release.

Get started

Explore	Configure	Use
Learn about Telecommunications Customer 360	Setup and configure Telecommunications Customer 360	Use Telecommunications Customer 360

Additional resources

- Learn more about the key features, see Telecommunications Customer 360 release notes.
- Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Telecommunications Customer 360 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 Telecommunications Customer 360 users at Now Community.

Explore Telecommunications Customer 360

Use the Telecommunications Customer 360 application to get a unified view of customer data including account details, interaction history, product inventory, and billing, and resolve issues faster from a single workspace.

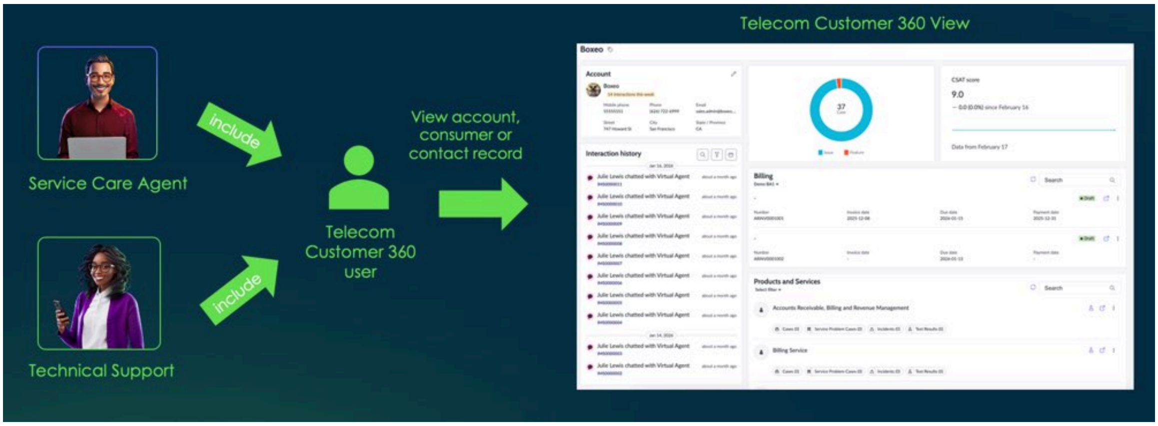
Telecommunications Customer 360 customer service representatives can look up complete customer details and examine history and diagnostics. They can also take actions such as creating cases, billing inquiries, and work orders.

Telecommunications Customer 360 gives customer service representatives the information, context, and insights to analyze customer issues and reach a resolution faster, without switching between applications.

Key capabilities include:

- A 360-degree customer card with live information for immediate, complete context.
- A unified timeline of interactions, billing details, and live diagnostics to understand the full history behind a customer's issue.
- AI-generated summaries of customer health, recent issues, and sentiment powered by Now Assist.
- Actions to create cases, billing inquiries, work orders, and customer orders, with playbook-driven recommendations for customer issues.
- Data visualizations including case breakdown charts and CSAT scores.
- Data configuration for different card components and ability to gather data from different sources.

You can access the Telecom Customer 360 page from the CSM/FSM Configurable Workspace from an account, consumer, or contact table.



To start using Telecommunications Customer 360, see Telecommunications Customer 360 home page.

Configure Telecommunications Customer 360

Setup and configure the Telecommunications Customer 360 application.

Activate Telecommunications Customer 360

If you have an admin role, you can activate the Telecommunications Customer 360 application. The Telecommunications Customer 360 (com.sn_telecom_c360) plugin is available as a separate subscription. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

The Telecommunications Customer 360 (com.sn_telecom_c360) plugin activates these related plugins, if they aren't already active.

Plugin / Scoped app	Details
Customer Service	`com.sn_customerservice`
Customer Central	`com.sn_csm_customer_central`
Customer Service Billing Account	`com.snc.billing_account`
Order to cash common architecture	`com.sn_otc`
Case management for invoice operations	`com.sn_csm_invoice`
Customer Lifecycle Management Workflows	`com.snc.customer_lifecycle_mgmt_workflows`
Case Playbook for Complaints	`com.sn_csm_complaint_caseflow`
Order management for TMT	`com.sn_om_tmt`
Customer Service Problem Management	`com.sn_sprb_mgmt`
Customer 360 data configuration	`com.sn_c360_dataconfig`
Recommended Actions for Telecommunications	`com.snc.sn_telecom_ra`

servicenow

Plugin / Scoped app	Details
Now Assist for Telecommunications (optional)	com.sn_telco_gen_ai

Setup Telecommunications Customer 360

Use the Telecom Customer 360 guided setup to configure the unified customer view for your organization. Complete the three setup tasks to define your cards and configure their data and settings. Verify the page layout before customer service agents use it.

Before you begin

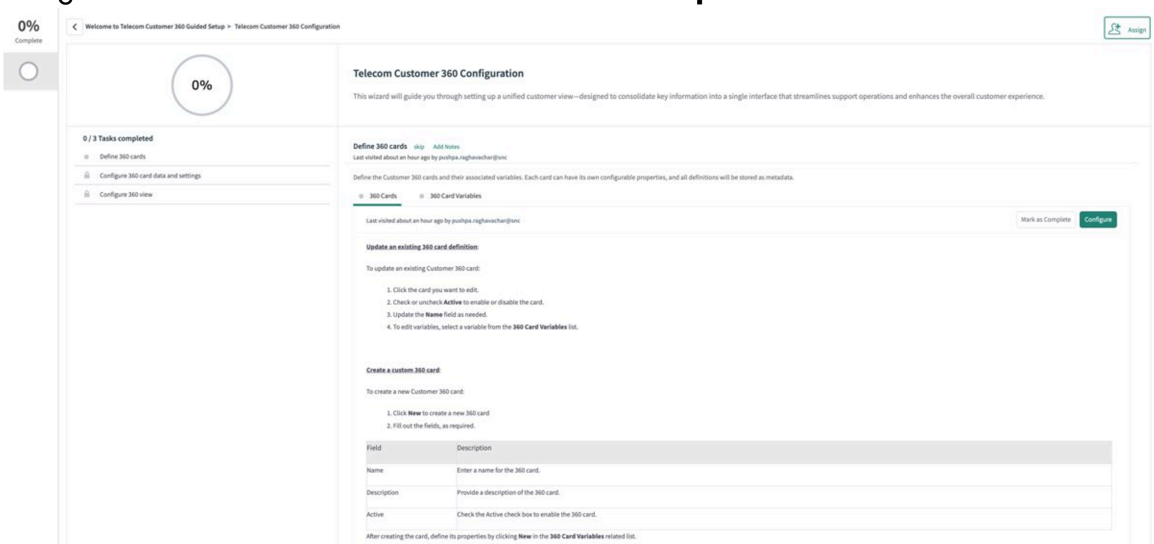
Role required: `sn_telecom_c360.admin`

About this task

Use the guided setup option to review the default configuration for the Telecommunications Customer 360 view, and make changes if required. You can skip individual tasks if no changes are needed, but all three tasks must be marked complete before the setup is finished.

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.



2. Complete the **Define 360 cards** task.
3. Select the **360 Cards** tab.
   The following cards are included with the base system:
   - Insights
   - Contact card
   - Interaction history
   - Data visualization group
   - Billing
   - Products
   - All tasks
4. To update an existing card definition, select **Configure**, select the card you want to edit, follow the steps on the guided setup page and select **Mark as Complete**.
5. Select the **360 Variables** tab.

Card variables define the configurable properties for each card, such as data tables, query conditions, and display fields. Review or update the variables associated with each card and select **Mark as Complete** to unlock the next task.

6. To create a custom card, select **Configure** and then select **New** and fill in the required fields. Creating a custom card only defines the card's metadata. To display the card in the Telecom Customer 360 view, you must also add it to the page in UI Builder. See UI Builder for details.
7. Complete the **Configure 360 card data and settings** task.
   Use this task to configure the data, display, and visibility settings for each card for the three supported contexts: account, consumer, and contact. Select **Configure** and review or update the following:
   - Context table, card variables, and query conditions that determine the data to be retrieved.
   - Fields and columns to be displayed on the card.
   - User roles to restrict access to specific users.

   Note:
   - To override or change the default card setting, clone the card setting, modify it as required, and set a higher order than the default setting.
   - To create a role specific experience, create card setting record, define the context table and variables, and set a specific role and higher order than the default setting.
8. Complete the **Configure 360 view** task.
9. Select **Configure** to open the Telecom Customer 360 record page variant in UI Builder.

   Note: The Telecom Customer 360 record variant is set to Read-only. Do not edit the Telecom Customer 360 record variant directly to preserve the base configuration and avoid upgrade conflicts. Clone the record variant, set an appropriate order, update the variant condition and audience on the new version. See UI Builder for details.
10. Select **Mark as Complete**.

Result
After the cards have been configured, customer service agents can start using the Telecommunications Customer 360 application. See Telecommunications Customer 360 home page for details.

Configure the Telecommunications Customer 360 variables

Configure the properties for each card, such as data tables, query conditions, and display fields.

Configure the data visualization group variables

Configure the variables in the data visualization card.

Before you begin
Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **Data visualization group**.
3. Modify the following variables.

Variable name	Description
Saved visualizations	A list of saved visualization records to be displayed on the card. The default values are top customer cases and the CSAT score.
PAR visualization filters	Name-value pairs that define the dynamic performance analytics filters used to associate each visualization to the current context record.

Related topics

Data visualization card

Configure the contact card variables

Configure the variables in the contact card.

Before you begin
Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **Contact**.
3. Modify the following variables.

Variable name	Description
Data table	The table to retrieve customer fields from (for example, `customer_account`)
Data table query	Query condition that filters the data table to the current context record.
Fields	Comma separated list of fields to display on the card. Default fields are Mobile phone, Phone, Email, Street, City, State/Province.
Avatar field	The field from the data table to be used as the avatar image for the card.
Show avatar	Controls whether the avatar is displayed.

Related topics

Contact card

Configure the billing card variables

Configure the variables in the billing card.

Before you begin
Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **Billings**.
3. Modify the following variables.

Variable	Description
Billing account table	The table from which the billing accounts are to be retrieved. The default is `sn_billing_account_billing_account`.
Billing account table query	Query condition that filters the billing account table to accounts associated with the current context record.
Billing account dropdown field	The field from the billing account table to use as the account label in the drop down filter.
Invoice table	Based on the selected billing account, the table from which the invoices are to be retrieved.
Invoice case table query	Query condition that filters the list of invoices for the selected billing account.
Invoice header field	The field from the invoice table used to display the header label for each invoice row.
Invoice fields	The fields to be displayed for each billing invoice. Default includes invoice number, invoice date, due date, and payment date.
Invoice search field	The search criteria to be used to filter the list of billing accounts to be displayed.

Related topics

Billing card

Configure the insights card variables

Configure the variables in the insights card.

Before you begin

Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **Insights**.
3. Modify the following variables.

Variable name	Description
Enable proactive trigger	This variable is enabled by default. If this variable is inactive, the insights are not automatically generated when you open the customer or consumer account. After you open the account, select **Generate telecom customer 360 insights** to generate the insights for the account.

Related topics

Insights card

Configure the products card variables

Configure the variables that control what data the products card displays and how users can search and filter sold products.

Before you begin

Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **Products**.
3. Modify the following variables.

Variable	Description
Product data table	Table used to retrieve product list items. Must be the sold product table (`sn_install_base_sold_product`) or a child table extending from this table. Custom tables that extend from the sold product table are also supported.
Product data table query	Query condition that filters the product table to the current context record. By default, products that have a parent sold product are excluded.
Primary filter	Field used as the primary filter at the top of the card. Defaults to product location.
Heading field	Field displayed as the heading of each product list item. Defaults to the sold product name.
Subheading field	Field displayed as the subheading of each product list item. Defaults to the product specification category.
Product search field	Search criteria used to filter the list of sold products displayed.
Avatar field	Field used for the product avatar image. Defaults to the product model category image. If no value is specified, a default image appears.
Enable search on product characteristics	Flag that enables search by product characteristics. Select this flag to enable search against product characteristic values in addition to the product search field. Search is performed against characteristic values only.

Related topics

Products card

Configure the all tasks card variables

Configure the variables in the all tasks card.

Before you begin

Role required: sn_telecom_c360.admin

Procedure

1. Navigate to **All** > **Telecom Customer 360** > **Guided Setup** and select **Get Started**.
2. Select **360 Cards** > **All tasks tabset**.

3. Modify the following variables.

Variable	Description
Tab tables	The list of task tables to display as tabs. Each entry corresponds to one tab in the card. To add tab, add the table name and specify a query condition. To remove a tab, delete its entry from the list.
Task table query conditions	Query conditions that filter each task table to records related to the current context record. For example, filter cases by matching the case account sys_id to the current account sys_id.

Related topics

All tasks card

Extension points in Telecommunications Customer 360

Use scripted extension points to configure the display of the cards on the Telecommunications Customer 360 consumer page.

To access the available extension points, type `sys_extension_point.list` in the application navigator and select **Enter**. You can create multiple implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed.

Telecommunications Customer 360 extension points

Extension point	Description
sn_telecom_c360.ContactCardDataProvider	Control the data displayed on the Contact card for an account, consumer, or contact record. You can customize which fields appear, override the card title and avatar logic, or change how the editable state is determined.
sn_telecom_c360.InsightCardDataProvider	Control the configuration for the Customer insight card and shows AI-generated insights. You can customize which Now Assist skill configuration is used and whether insights are triggered automatically when the card loads.
sn_telecom_c360.DataVisualizationDataProvider	Define which reports appear on the Data visualization card and how context record values are mapped to report filters. You can add custom filter logic or support filter types not handled by the default implementation.
sn_telecom_c360.BillingsDataProvider	Customize how billing accounts and invoices are retrieved for the Billings card. You can change how billing accounts are linked to the context record, add custom invoice filtering or sorting logic, or adjust how invoice amounts and statuses are displayed.
sn_telecom_c360.ProductsServicesDataProvider	Customize how the Products & services card retrieves product inventory data, applies filters, and

Telecommunications Customer 360 extension points (continued)

Extension point	Description
	creates change orders. You can add support for different product tables, change how filter options are built, or modify the change order creation logic.
sn_telecom_c360.AllTasksDataProvider	Customize which task tables appear on the All tasks card and what actions are available in the card header. You can add or remove task tables, apply custom filters, or change the create action configuration.
sn_telecom_c360.ProductsRelatedDataProvider	Add custom pill types to individual product rows on the Products & Services card. Each implementation provides data for one type of related record (such as cases or incidents) linked to a sold product.
sn_telecom_c360.CardViewModel	Control whether a specific card is visible on the Customer 360 workspace. Implement isMatch to identify which card your view model applies to, and implement isVisible to define the conditions under which that card should be shown. By default, any card with no matching view model is visible.
sn_telecom_c360.VoiceInteractionDataProvider	Control the behavior of the Customer 360 record page when it is opened as a sub page from a voice interaction. Implement the provided methods to customize whether the consumer lookup alternate flow is enabled, and which cards or layout columns are hidden in the voice interaction sub page context.

Related topics

- Using extension points to extend application functionality
- Using scripted extension points in server-side scripts
- Using UI extension points in server-side UI macros
- Using client extension points in client-side UI scripting

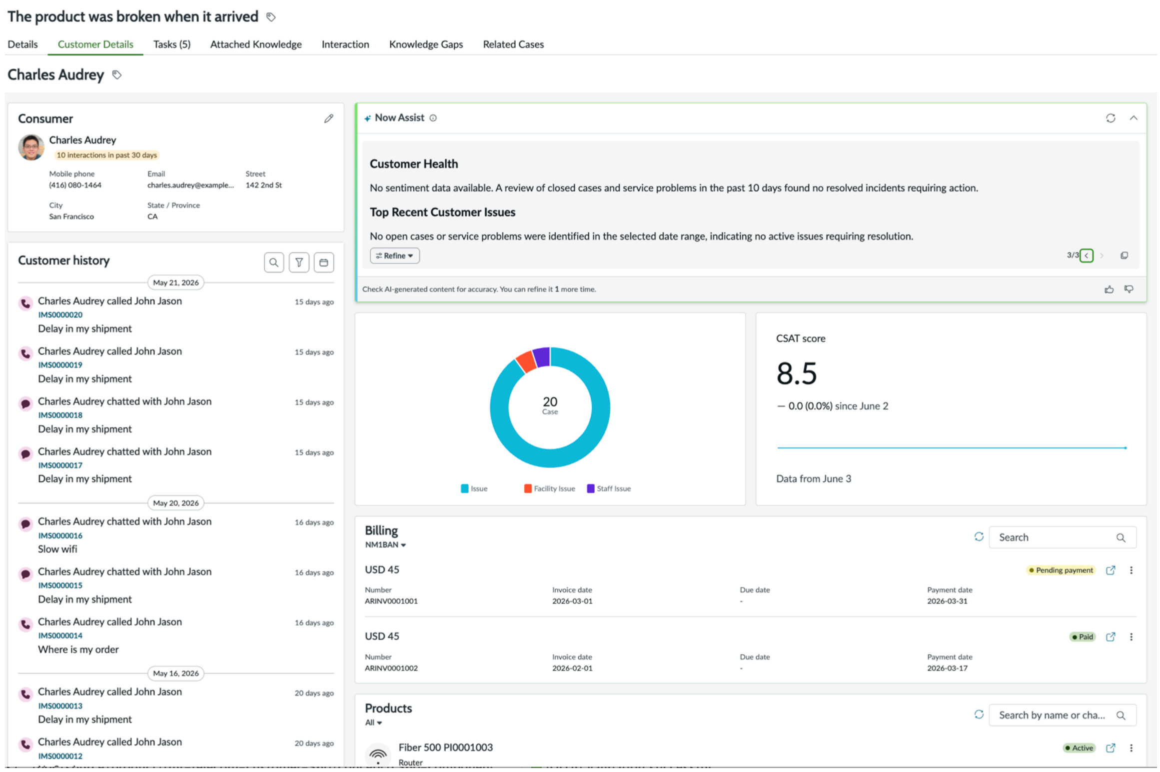
Telecommunications Customer 360 component

Telecom Customer 360 is a UI Builder component that provides a comprehensive 360 degree view of a customer record in the **CSM/FSM Configurable Workspace**. You can embed this component as a tab on the record page of any customer record.

All cards that appear on the Telecommunications Customer 360 home page are displayed on the Telecom Customer 360 component page with a few changes.

- The header information is not included as the component appears as a tab on the application record page.
- The All tasks card has a Tasks header and a **Create** option.
- The **Run diagnostics** option is not available on the Products card.
- The Related items contextual sidebar is not displayed.

The following image shows an example of a complaint case record with the **Telecom Customer 360** component. The complaint case record page includes a **Customer Details** tab that displays the 360-degree view of the account or consumer associated with the case.



Add the Telecom Customer 360 component to a record page

Add the Telecom Customer 360 component to a record page in UI Builder so that customer service representatives can see the 360-degree consumer or account view in the context of the record they are working on.

Before you begin

Role required: sn_telecom_c360.admin

About this task

Add the Telecom Customer 360 component as a dedicated tab on a record page in the CSM/FSM Configurable Workspace. The component displays configurable cards scoped to a single customer record. Cards cover customer contact details, products and services, billing, tasks, interaction history, data visualizations, and Now Assist AI insights.

Note:

- After adding the component, you must also add the **Setup Customer360 Context** data resource to the page. This data resource resolves the record to the associated account or consumer. Without it, the component context cannot be determined. See Add the Setup Customer360 Context data resource.
- The component can be only be added as a new tab on the record page. You can't embed it within an existing tab.

Procedure

1. Navigate to **All > Now Experience Framework > UI Builder**.
2. Select **Experiences**.
3. Select **CSM/FSM Configurable Workspace** from the list.

4. Open any existing record page, or create a record page, add a tab to the page, and then add the **Telecom Customer 360** component.
   For detailed instructions on how to add a component, refer to the UI Builder documentation.
5. Add the Setup Customer360 Context data resource to enable the Telecom Customer 360 component to display the correct consumer or account view.
   See Add the Setup Customer360 Context data resource for details.
6. Configure the Telecom Customer 360 component properties.

   Set the following three properties. Leave all other component properties at their default values.

Label	Name	Value
Table	`Table`	Select the `table` output of the **Setup Customer360 Context** data resource.
Sys ID	`sysId`	Select the `sysId` output of the **Setup Customer360 Context** data resource.
Card definition map	`cardDefinitionMap`	A JSON object that maps each card key to the sys ID of the card definition record to display. See the following example:

```
{
  "insights":
 "<sys_id_of_insights_card>",
  "contact":
 "<sys_id_of_contact_card>",
  "interaction":
 "<sys_id_of_interaction_history_car
d>",
  "billings":
 "<sys_id_of_billing_card>",
  "products":
 "<sys_id_of_products_card>"
}
```

Note: The Card definition map uses the sysIds from the `sn_c360_dataconfig_card` table.

Result
When you navigate to a record on the page where the component is added, the new tab displays the Telecom Customer 360 view for the account or consumer associated with that record. To change the cards that are displayed or the data shown on each card, update the card settings as described in Configure the Telecommunications Customer 360 variables.

What to do next
Add the Setup Customer360 Context data resource to the page. For more information, see Add the Setup Customer360 Context data resource.

Add the Setup Customer360 Context data resource

Add the Setup Customer360 Context data resource to the record page to enable the Telecom Customer 360 component to display the correct consumer or account view.

Before you begin
Role required: sn_telecom_c360.admin

About this task

The Setup Customer360 Context data resource resolves the record on the page to the associated account or consumer and provides the table name and sys ID to the Telecom Customer 360 component. The data resource reads the account and consumer fields on the record and returns the populated reference.

- If only the account field is populated, the data resource returns the account table and the account sys ID. The component displays the 360 view for that account.
- If only the consumer field is populated, the data resource returns the consumer table and the consumer sys ID. The component displays the 360 view for that consumer.

Procedure

1. In the **Data and scripts** section, select **Add data resource**.
2. Select the **Setup Customer360 Context** data resource.
3. Configure the data resource with the following inputs:
   - Table: The table of the record page where the component is placed. Select the page parameter that contains the table name.
   - Sys ID: The sys ID of the record on the page. Select the page parameter that contains the record sys ID.
4. Save the page.

What to do next

Configure the Telecom Customer 360 component properties. For more information, see Configure the Telecommunications Customer 360 variables.

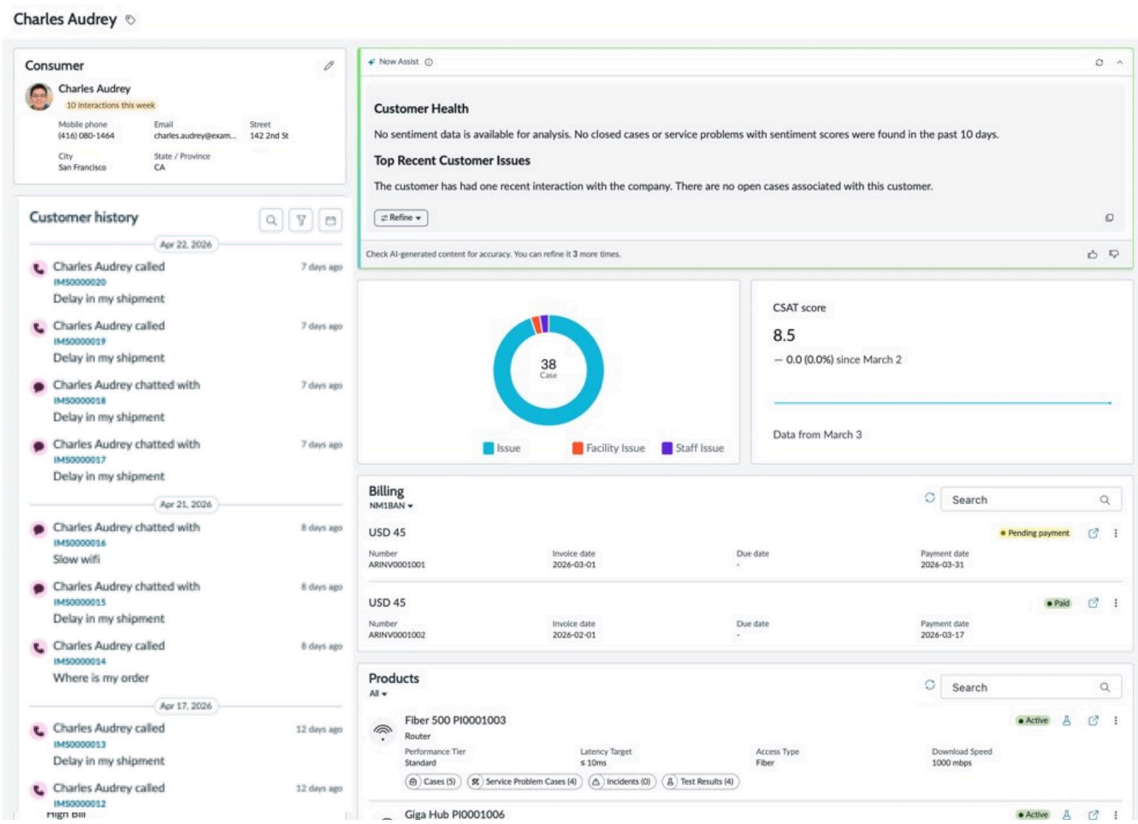
Use Telecommunications Customer 360

Use Telecommunications Customer 360 to view and manage customer information from a single view.

Telecommunications Customer 360 home page

Telecommunications Customer 360 consolidates customer information, interaction history, products, and billing into a single view. The view displayed is based on the record type which can be account, consumer, or contact.

To view the page, navigate to the **CSM/FSM Configurable Workspace** and select an account, consumer, or a contact from the **List** view.



The page displays the following cards:

- Insights: Displays an AI generated summary of the customer health and top customer issues.
- Data visualization card: Visualizations showing issues and CSAT score.
- Contact card: Primary account holder's account, contact, or consumer information.
- Customer history card: A timeline of past interactions across phone and chat channels. Additional interaction channels can be configured.
- Products card: Displays a list of all the sold products associated with the account, consumer, or contact.
- Billing card: Billing account details, invoices, and payment status for the account, contact, or consumer.
- All tasks card: Quick-create options for service problem cases, work orders, invoice cases, complaint cases, customer orders, and standard cases.

Related items

The Related items in the contextual sidebar provides quick access to related records and customer activity for the current account, consumer, or contact. Default related list items have been configured for account, consumer, and contact records but can be modified.

To configure the list of related items that appears, navigate to **All** > **Customer service** > **Customer**. Then select Account, Consumer, or Contact, add, or remove a related list from the view to update it in the contextual panel.

Note: The related items that appear are determined by the related lists configured in the Customer 360 view. See Setup Telecommunications Customer 360 for details.

Tasks

You can perform the following tasks on this page by selecting an option from the **Create** drop down list. You will either see a dialog box or a new page where you can enter information related to the selected option.

- Service Problem Case: See Create a service problem case from the workspace.
- Case: See Create a service problem case in the Customer Service Portal.
- Customer Order: See Configuring Order Management.
- Work Order: See Create a work order.
- Complaint Case: See Case Playbook for Complaints.
- Invoice Case: See Create an invoice case.

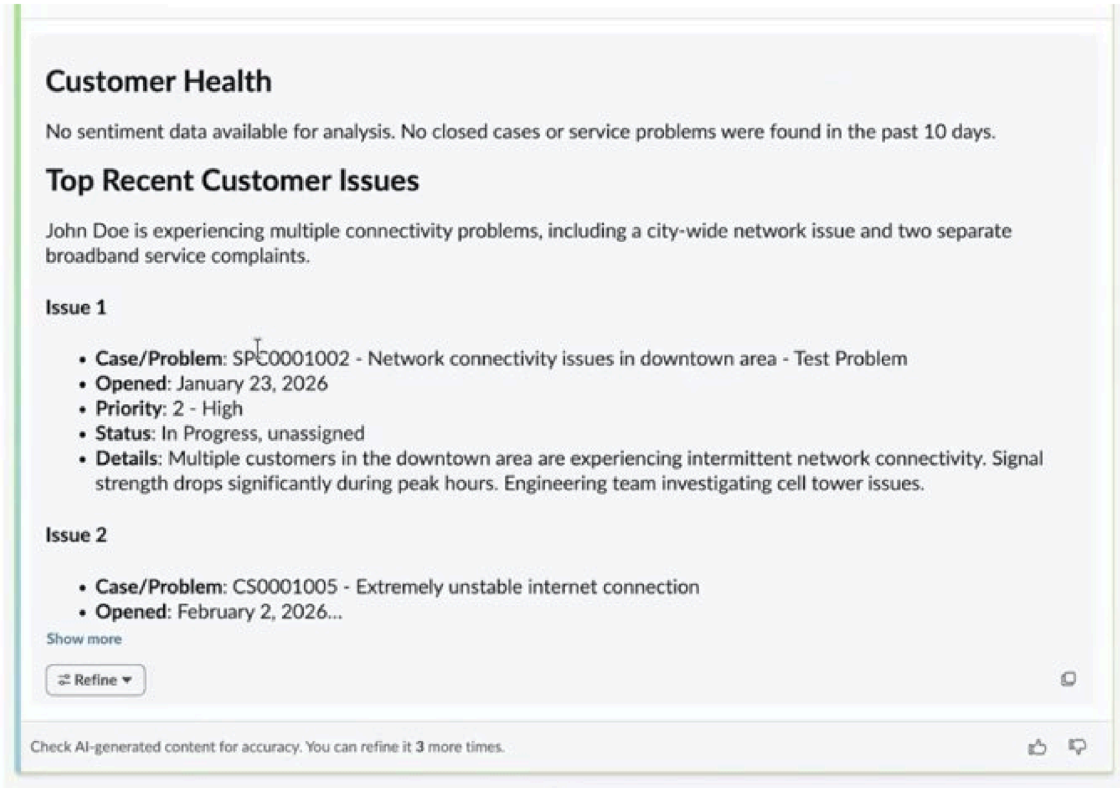
Note: The options that appear in the **Create** drop down list are based on the tables configured in the Tab tables field in the all tasks card settings. See All tasks card for details.

Insights card

The card provides AI-generated customer health insights and recent customer issue insights for a consumer or a customer account.

The following insights are displayed on the card:

- Customer health: Displays the overall customer health trend based on cases and sentiment data analyzed over the past 30 days. If no sentiment data or closed cases are available, the card displays a message indicating that no data is available for analysis.
- Top recent customer issues: Displays a summary of recent customer issues based on open cases and service problem cases associated with the consumer or customer account. The summary includes:
  - A one to two line overview of the most common or significant issues.
  - A list of individual issues, each showing the case or service problem number, opened date, priority, status, assigned to, and details.



You can configure variables such as tables, display fields, and query conditions. See Configure the insights card variables for details.

Data visualization card

The data visualization card provides key customer metrics with case breakdowns and customer satisfaction score.

The following visualizations are displayed for the account, consumer, or contact record:

- Case breakdown donut chart: Displays the total number of cases associated with the current record as a donut chart, broken down by case type (for example, Issue and Facility Issue). The total case count is shown in the center of the chart. Each segment represents a case category and is color-coded.
- Customer Satisfaction Score (CSAT): Displays the average CSAT data for the current record as a single numeric score with a trend line based on when the data was last collected. The CSAT score is based on satisfaction surveys submitted by customers. The score displayed is the average across all surveys taken by the relevant contact for the current record:
  - Account Score is calculated from surveys taken by the account's primary contact.
  - Contact context: Score is calculated from surveys taken directly by that contact.
  - Consumer context: Score is calculated from surveys taken by the primary user associated with the consumer record.

You can configure variables such as tables, display fields, and query conditions. See Configure the data visualization group variables for details.

You can add custom visualizations to the data visualizations card. For details, see Platform Analytics experience.

Contact card

The contact card displays the primary customer identification information for the account, consumer, or contact.

The contact card displays the following for each context:

- Avatar: An optional image configured when the card was setup.
- Interactions badge: A count of the recent interactions gathered from the Interaction history table.
- Contact information: Includes personal information like Mobile phone, Phone, Email, Street, City, and State/Province.

Use the Edit icon to modify any information on the card and select **Save** to save and update the card.

Note: The Edit option is available only for users with the `sn_customerservice_manager` role.

You can configure variables such as tables, display fields, and query conditions. See Configure the contact card variables for details.

Customer history card

This card displays recent customer activity associated with the account, consumer, or contact. Activity types include chat and phone interactions, as well as cases, contracts, work orders, and other activity types that you have configured.

All closed interactions associated with the account, consumer, or contact are grouped by date and sorted with the most recent date shown first. Each interaction entry show:

- Channel icon: A visual indicator of the activity type.
- Interaction number: A link that opens up the full interaction record (for example, IMS0000011).
- Short description: A brief summary of the interaction, including the contact name and the agent assigned to the interaction.
- Relative timestamp: How long ago the interaction occurred (for example, "about a month ago").

Note: You can customize the interaction details that are displayed. See Configuring the Customer History component for details.

You can do the following:

- Search: Enter a key word to display interactions meeting the search criteria.
- Filter: Specify filters to view activity by type, such as chat, phone, cases, or contracts.
- Date range: Browse interactions by date.
- View more: 10 interactions are displayed by default. Select **View More** to view additional interactions.

The information displayed in the customer history is based on the facets configured for the activity contexts in the Customer Central module. For more details on configuring the information displayed, see Create facets for activity contexts.

Products card

The products card displays a list of all products associated with the account, consumer, or contact.

The top 5 active sold products sorted by state and name are displayed. For each sold product, the following details are displayed:

- Heading: The name of the sold product by default. Configurable to any field from the product data table.
- Subheading: The product specification category by default. Configurable to any field from the product data table.
- Count indicators: Shows the count of the following related records associated with the sold product:
  - Cases
  - Service problem cases
  - Incidents
  - Test results

  Each related record indicator shows the total count. Select a record indicator to view a pop-up dialog box listing showing the top 3 records sorted by created date. Select the link to drill down to the record page.

Note: Only top-level sold products are shown in the table. Products with a parent sold product are excluded.

You can do the following:

- Filter the list of sold products displayed by Location but this can be configured.
- Specify a search criteria to view the list of sold products that meet the criteria. You can search either by name or product characteristic values.

  Note: Search by product characteristic values is available only if the **Enable search on product characteristics** flag is enabled. For more information, see Configure the products card variables.

- Select the icon to drill down to the sold product record page.
- Select the **Run diagnostics** icon to run diagnostics against a sold product.
- If there are more than 5 sold products, select **View all** to view all the products on the Sold Product page. Product actions, including Modify, are also available for each product in the View all list.
- You can modify the existing configurations, suspend, resume, or disconnect the sold products and their hierarchy. Select the icon and select one of the following actions:
  - Modify: This opens the page for the selected product. Modify the details as required and select **Update**. This creates a customer order record with the associated line items.
  - Suspend: Create an order to suspend a sold product and its hierarchy. Specify the `Start date and time`, the `Reason for Suspension`, and select **Suspend**.
  - Resume: Create an order to resume a sold product and its hierarchy. If a sold product is in an **Inactive** or **Suspended** state, specify the `Start date and time` and select **Resume**.
  - Disconnect: Disconnect a sold product and its services after fulfillment. Specify the `Start date and time`, the `Reason for disconnection`, and select **Disconnect**.

Note: These actions are available only for customer accounts.

You can perform these actions for multiple sold products from the View all list. For more details about these actions and the required conditions, see Customer Life Cycle Management Workflows.

Run diagnostics

Use this option to initiate service tests such as a speed test or connection test against a customer's sold products. Tests must be configured against the sold product's model ID before they appear as available options.

You can run diagnostics from:

- A specific product: Select the **Run diagnostics** icon on a sold product list item. The available tests configured against that product's model ID are shown.
- Page level: Select **Run diagnostics** without a product selected. All sold products associated with the current account are listed. The agent selects a product, and the available tests for that product are shown.

After selecting a test and initiating it, a confirmation is shown that the test has been initiated. Once a test is run, the result is created as a record. Refresh the page to view the test results counter updated. Select the test results to view the top 3 three test results sorted by creation date. Select the link to drill down to the record page.

You can configure variables such as tables, display fields, and query conditions. See Configure the products card variables for details.

Related topics

Creating pages and page variants

Billing card

The billing card displays a list of the customer's billing accounts and invoices.

The billing card displays billing accounts and invoices associated with the current account, consumer, or contact record. For each billing account, the following details are displayed:

- Billing account name: Displays the list of billing accounts associated with the record. If multiple billing accounts exist, use the drop-down list to switch between them. To view invoices for a specific account in the hierarchy, select a child account from the drop-down list to filter the invoice list.
- Invoices: Displays the list of invoices for the selected billing account, including invoice number, invoice date, due date, and payment date.

You can do the following:

- Search: Enter a number to display invoices associated with the account.
- Filter: Specify filters in the drop down list to view parent and child accounts.
- View all: 5 invoices are displayed by default. Select **View all** to view additional invoices.
- Select the to drill down to the invoice record page.

- Select **Create invoice case** to create an invoice case for the billing account. See Create an invoice case for details.
- Select the Refresh icon to refresh the invoice list to reflect any newly added records or any changes made to the invoices.

You can configure variables such as tables, display fields, and query conditions. See Configure the billing card variables for details.

All tasks card

The All tasks card aggregates tasks from multiple configurable tables and displays them in a tabbed layout.

Each tab corresponds to a task type and shows the records related to the current account, consumer, or contact. The tabs shown depend on the plugins are installed on the instance. By default, service problem cases, cases, customer orders, work orders, complaint cases, and invoice cases are displayed if the following plugins are installed:

- Customer Service Problem Management (sn_sprb_mgmt)
- Customer Service (com.sn_customerservice)
- Order Management (sn_ind_tmt_orm)
- wm_order, (global)
- Case Playbook for Complaints (sn_complaint)
- Case Management for Invoice Operations (sn_csm_invoice)

You can do the following:

- Select the gear icon to personalize the columns that are displayed in each tab.
- Add filters to the columns to customize the list of records displayed.
- Select a link to drill down to the related record page.

You can configure variables such as tables, display fields, and query conditions. See Configure the all tasks card variables for details.

View interaction record

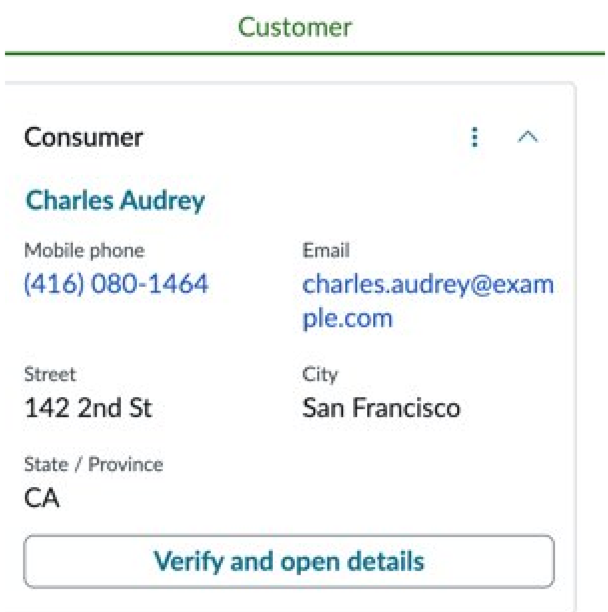
Use this option to view and manage customer phone interaction records.

Before you begin

- Interaction Controls Component plugin (com.app_interaction_control) plugin must be installed.
- Role required: sn_telecom_c360.admin, sn_telecom_c360.user

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace** > **Interactions** > **All Interactions**.
2. Select an interaction from the list of consumer phone interaction records displayed.



3. Select the **Verify and open details** option to verify the details and open the consumer record page.

   Note:

   - The **Verify and open details** option is displayed only if the **Verified** check box has not been selected in the Interaction record page.
   - This page is a variant of the Customer Service Management voice interaction page. The Open Frame configuration with the Interaction Controls component must be active for this page to display. This configuration is shipped with demo data and is active by default. For setup prerequisites and configuration details, see CSM voice interaction record page.

Related topics

Telecommunications Customer 360 home page

Creating pages and page variants

Recommendations panel

The Recommendations panel displays Knowledge Base article suggestions and enables you to search for Knowledge Base articles and trigger agentic workflows.

The Recommendations panel is available in the contextual side panel on the Telecommunications Customer 360 home page. It contains two tabs:

- Suggested actions: Knowledge Base articles that are available as part of demo data.
- Search: Enter a search term to find Knowledge Base articles and, when the Now Assist for Telecommunications, Media and Technology (TMT) application is installed, agentic workflows that match the term.

Suggested actions

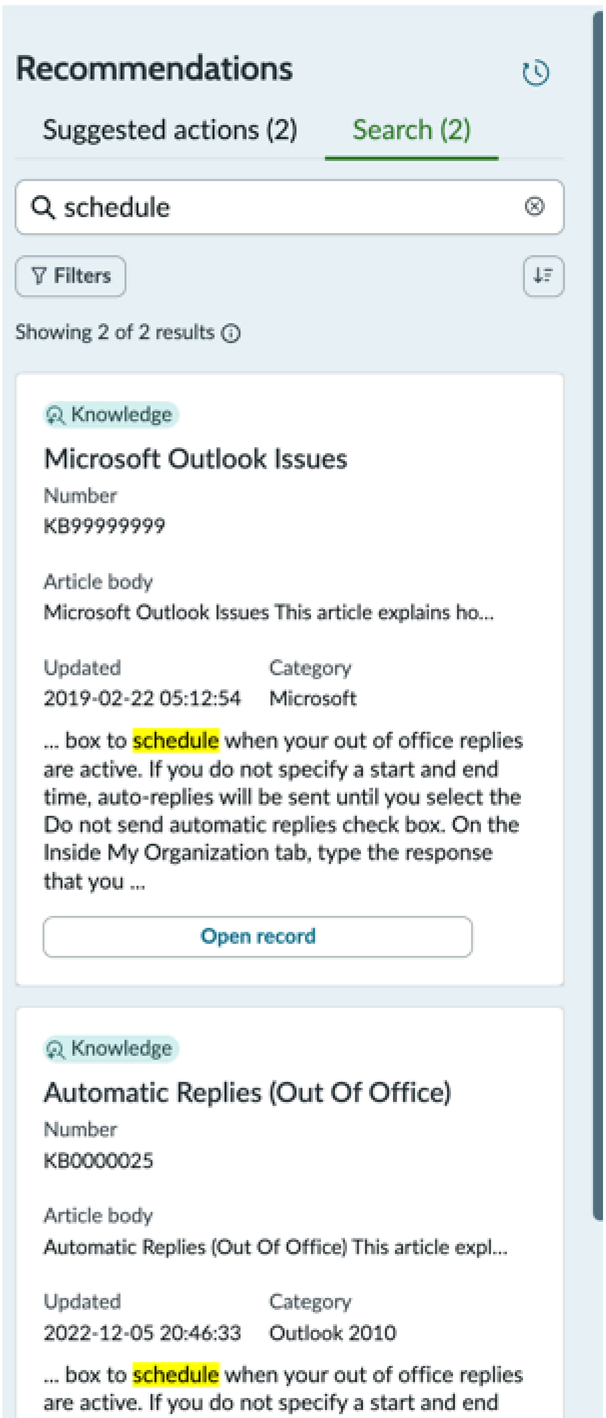
If demo data is installed, the Suggested actions tab displays Knowledge Base articles relevant to the current account or consumer.

When demo data is not installed, no rule mappings exist and the Suggested actions tab is empty.

To open the full content of a suggested Knowledge Base article, select **Open record** on the article.

Search

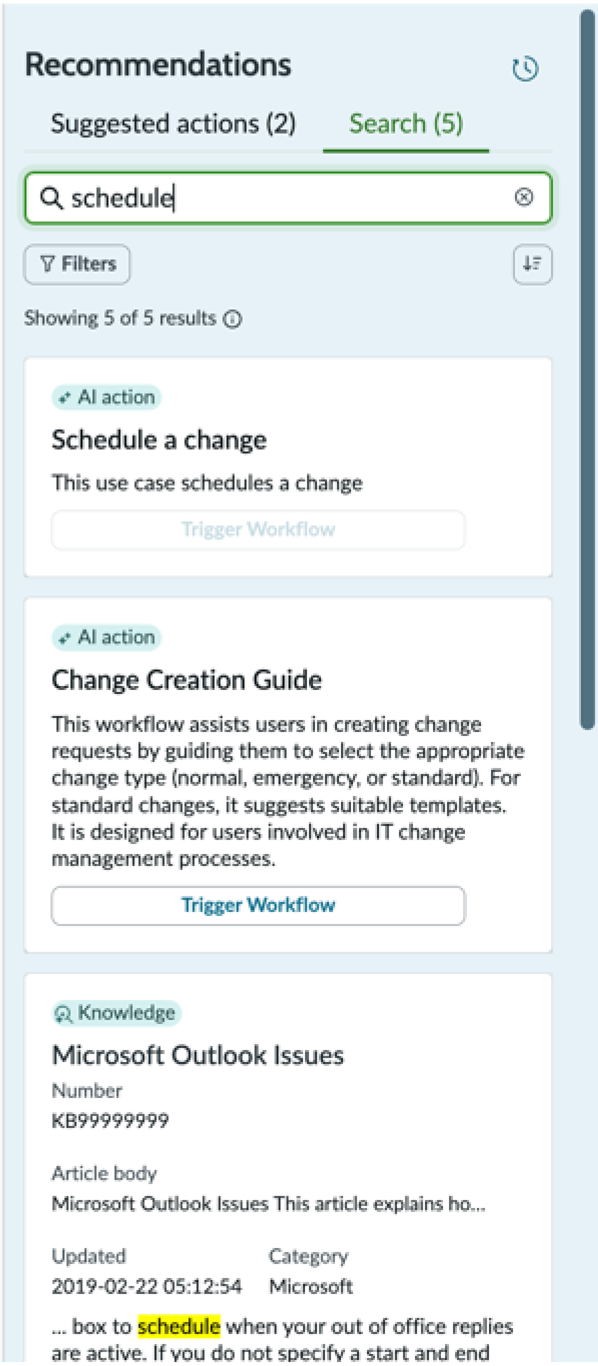
By default, a non-AI recommended action context is installed that supports Knowledge Base article search only. When you enter a search term, the results show matching Knowledge Base articles with a **Knowledge** badge. Select **Open record** on a result to view the article.



When the Now Assist for Telecommunications, Media and Technology (TMT) is installed, AI recommended action contexts are installed and the default non-AI recommended action contexts are deactivated. When you enter a search term, the results show both Knowledge Base articles and matching agentic workflows with an option to trigger them.

Note:

- You can view the agentic workflows only if you have the sn_aia_viewer role.
- You can execute a workflow only if you have the sn_nb_action.next_best_action_user role and at least one of the roles defined for the specific agentic workflow.



The **Trigger Workflow** button is enabled only when all of the following conditions are true:

- You have the now_assist_panel_user role, which lets you open the Now Assist panel.
- A record exists in the sys_gen_ai_skill table for the agentic workflow. Without this record, the agentic workflow appears in the search results, but the **Trigger workflow** option is turned off.
- You have at least one of the roles defined for the specific agentic workflow. The role list is configured on the Workflow Role Masking Configuration related list of the use case record, in an Agent Access Role Configuration with the **Limit To Roles** action.

Select **Trigger Workflow** to open the Now Assist panel and run the workflow. Your search term is passed to the workflow as the initial user prompt.

For example, if you search for `suggest configuration items for change request CHG0001234` and select **Trigger Workflow**, the workflow opens in the Now Assist panel with that full string as the initial prompt and uses the change request number directly to find relevant configuration items.

Related topics

- Now Assist for Telecommunications, Media and Technology (TMT)
- Telecommunications Customer 360 home page

Telecommunications Network Inventory

With the ServiceNow® Telecommunications Network Inventory application, you can build a digital representation of your physical and logical networks, and the services that are provisioned to your customers. This network inventory contains the assets, services, and the relationships that define the infrastructure of your telecommunications networks.

Watch this short video for an introduction to the Telecommunications Network Inventory application.

https://player.vimeo.com/video/1017254752?badge=0&autopause=0&player_id=0&app_id=58479

Get started

Explore	Configure	Integrate
Learn about how providers use Telecommunications Network Inventory.	Plan and configure your Telecommunications Network Inventory.	Extend Telecommunications Network Inventory capabilities by integrating with other applications.

Use

Use Telecommunications Network Inventory to create and review a comprehensive network inventory model.

Reference

Get Telecommunications Network Inventory reference information.

Additional resources

- Learn more about what's new and changed, see the Telecommunications Network Inventory Release Notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Telecommunications Network Inventory 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 ServiceNow Impact.
- Connect with other Telecommunications Network Inventory users at Now Community.

Telecommunications Service Operations Management

Learn how Telecommunications Service Operations Management (TSOM) empowers communication service providers (CSPs) to proactively monitor, analyze, and resolve network and service issues before they impact customers. Built on the ServiceNow AI Platform, TSOM delivers a unified operations view across distributed, multi-domain telecom environments, helping teams improve service availability, operational efficiency, and customer satisfaction.

Get started

Explore

Learn about how telecom service providers use Telecommunications Service Operations Management.

Configure

Plan and configure your Telecommunications Service Operations Management.

Use	Reference
Use Telecommunications Service Operations Management to track comprehensive telecom service operations.	Get Telecommunications Service Operations Management reference information.

Additional resources

Some ServiceNow resources that can provide you with helpful information are:

Release Notes

Learn more about what's new and changed in this release at Telecommunications Service Operations Management (TSOM) release notes

ServiceNow Community

Connect with other Telecommunications Service Operations Management users at Now Community

ServiceNow Impact

Find useful resources related to your role and explore best practices at the ServiceNow Impact

ServiceNow University

Access real time courses, self-paced training, and career resources at ServiceNow University

Support

Contact customer service support at https://support.servicenow.com/now

TMF APIs for TMT

Review the multiple TM Forum (TMF) Open APIs supported for the product, see TMF APIs for TMT

Telecom data model

Explore the CI classes and relationships that represent telecom network elements in the CMDB at Telecom data model

TMF APIs for TMT

Get the details of ServiceNow® implementation of TM Forum (TMF) APIs for Telecommunications, Media, and Technology (TMT) products.

ServiceNow® supports multiple TM Forum (TMF) Open APIs through its telecommunications industry solutions, such as Telecommunications Service Management (TSM) and Technology Provider Service Management (TPSM). These APIs enable standardized integrations and help ensure seamless interoperability across Business Support Systems (BSS) and Operations Support Systems (OSS).

TMF APIs

Application	API	Description
Sales CRM for Telecommunications	TMF620 - Product Catalog Open API	The *Product Catalog Open* API provides endpoints to create and retrieve product catalogs, product offerings, and product specifications. Use this API to manage product catalog information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF622 - Product Order Open API	The *Product Order Open* API provides endpoints that enable a standardized mechanism for placing product orders. Use this API to receive the Sales/Product Order from external CPQ/CRM.
Customer foundation	TMF633 - Service Catalog Open API	The *Service Catalog Open* API provides endpoints to create and retrieve service specifications. Use this API to manage service catalog information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF637 - Product Inventory Open API	The *Product Inventory Open* API provides endpoints to create and retrieve product inventories. Use this API to manage product inventory information between external systems and the ServiceNow AI Platform.
Sales CRM for Telecommunications	TMF641 - Service Order Open API	The *Service Order Open* API provides endpoints that enable a standardized mechanism for placing service orders.
Sales CRM for Telecommunications	TMF645 - Technical Service Qualification Open API	The *Technical Service Qualification Open* API provides endpoints to check the availability of resources and services before submitting orders for fulfillment.
Sales CRM for Telecommunications	TMF648 - Quote Open API	The *Quote Management* API provides endpoints to create, update, and retrieve customer quote data.

TMF APIs (continued)

Application	API	Description
Proactive Service Experience Workflows	TMF621 - Trouble Ticket Open API	The `Trouble Ticket Open` API provides endpoints to create, update, and retrieve data from the Case [sn_customerservice_case], Incident [incident], and Service Problem Case [sn_sprb_mgmt_case] tables. Use this API to manage ticket information between external ticketing systems and the ServiceNow AI Platform.
Customer foundation	TMF632 - Party Management Open API	The `Party Management Open` API provides endpoints for managing parties with a relationship to the enterprise, like a consumer, account, or contact. Use this API to create, update, and retrieve data from the Consumer [csm_consumer], Account [customer_account], and Contact [customer_contact] tables.
Telecommunications Network Inventory	TMF639 - Resource Inventory Open API	The `Resource Inventory Open` API provides endpoints to create, retrieve, and delete resources. Use this API to manage resources in various network inventory tables.
Telecommunications Service Operations Management	TMF642 - Alarm Management Open API	The `Alarm Management Open` API provides endpoints to create, update, and retrieve data from the Events [em_event] and Alert [em_alert] tables.
Telecommunications Service Operations Management	TMF688 - Event Notification Management Open API	The `Event Notification Management Open` API provides an endpoint to create, update, and delete events from the Events [em_event] table.
Field Service Management for Telecommunication	TMF646 - Appointment Open API	The `Appointment Open` API is a telecommunication API that allows you to interact with the appointment booking application. Use this API

TMF APIs (continued)

Application	API	Description
		to book appointments and search available time slots.
Field Service Management for Telecommunication	TMF697 - Work Order management Open API	The *Work Order Management* API provides endpoints to create, update, and retrieve work orders.This API is exposed by Field Service Management for Telecommunication and used by Sales CRM for Telecommunications and Telecommunications Service Management to trigger a work order from either an order task or a case task.
Customer Service Problem Management	TMF653 - Service Test Management Open API	The *Service Test Management Open* API provides endpoints to create and retrieve service test definitions and service tests. Use this API to manage service problem management information between external systems and the ServiceNow AI Platform.